

# XMediusFAX™

BOARDLESS, T.38 FAX OVER IP SERVER



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Global leader in advanced fax server solutions that leverage  
IP telephony, UC & ECM systems

## Installation and Maintenance Guide

**SaGEMCOM**



## **XMediusFAX**

Version Number 7.0.0.298 – August 2012.

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- Protected by Canadian Patents 1,329,852; 2,101,327; 2,417,202.
- Additional US, Europe and Japan patents pending.

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Chapter 1

Introduction

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Guide Overview

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This guide provides:

- The hardware and software requirements for installing and using XMediusFAX(server and client applications).
- The XMediusFAX applications installation procedures for the server side.
- Some information on basic system and site configuration.
- Some recommendations on SMTP Integration and the procedures for integrating Microsoft Exchange and for installing custom fax forms (MS Outlook and Lotus Notes).
- Concepts and procedures about Microsoft Exchange UM Integration.
- The XMediusFAX client applications and tools installation procedures.
- The maintenance procedures for the server and the client applications.
- The uninstallation procedures of the server and client applications.

The XMediusFAX Modules

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An XMediusFAX system consists of a series of modules installed on one or more servers. Each module installs one or more executables running as services. Each service hosts one or more components that execute specific tasks. Installed components can be monitored via the administration interface (**Services Status**).

Fax Manager Module

The fax manager module is at the heart of the fax system. All persistent storage (configurations, fax detail records and media files) are managed by the components installed with this module. When several instances of the components managing the storage are installed in the same fax system, their persistent storage data will be automatically replicated on all active instances.

Services installed are:

XMFaultTolerance	Monitors faults and supervises failover;
XMCoConfig	Manages all Site configurations (users, profiles, etc.);
XMConfigManager	Manages all System configurations;
XMFaxManager	Manages the incoming and outgoing fax queues and distributes jobs to all other components. Also manages the media file database;

XMFaxArchive	Stores and manages access to the fax detail records.
--------------	--

### Fax Driver Module

The fax driver module is responsible for sending and receiving faxes using the H.323/SIP/T.38 protocols or fax boards. A fax driver can handle multiple simultaneous fax calls, and several fax driver modules can be installed within a fax system. When more than one driver is installed on a system, outgoing faxes will automatically load-balance between the drivers.

Service installed: `XMFaxDriver`


### Rasterizer Module

The rasterizer converts documents (doc, pdf, txt, xls, jpg, htm, etc.) into fax format (TIFF). To do the conversion, it uses native applications and specialized converters. Since document conversion is processing-intensive, it is common to install more than one rasterizer on a system. When more than one rasterizer is installed on a system, conversion jobs will automatically load-balance between the rasterizers.

Service installed: `XMDocumentRasterizer`

### SMTP Gateway

The SMTP gateway provides a way to submit fax jobs using e-mail clients, and to send back e-mail notifications. The gateway acts as an SMTP mail server (listens on port 25) to accept new fax jobs (i.e., it cannot run on a server where another SMTP server is in use). When more than one SMTP gateway is installed on a system, notifications will automatically load-balance between the gateways. The SMTP gateway handles all SMTP messages including those sent by Microsoft Exchange.

 **Note:** For more information about using SMTP with XMediusFAX and planning specific deployments or configurations with mail servers, see [The XMediusFAX SMTP Gateway](#) on page 35.

Service installed: `XMSMTPGateway`

### XML Gateway

The XML gateway provides a way to submit fax jobs by using an XML document that specifies the recipients, sender information, fax options and attachments. This is usually used for fax broadcasting or fax automation. The gateway scans specific folders for “xml” fax job and submits them to the fax manager. The XML gateway is also used in collaboration with SendFAX and WebCompose.

Service installed: `MXXMLGateway`

## Licensing

---

XMediusFAX is a licensed software, which means you must receive an official license to be able to configure and use it properly.

### Purpose and Effects of the XMediusFAX License

The purpose of the XMediusFAX license is to control the Fax Server at two levels:

- System components limits (maximum number of users, sites, gateways and channels)
- Features availability (some of them can be enabled or disabled)

The license settings may vary according to the terms defined with your XMediusFAX reseller.


 **Note:** For more details on licensed features, please refer to the XMediusFAX Administration Guide.

## Default License

When installing XMediusFAX on a new system, a default license is made available for evaluation purposes. This demo license enables all the fax server functionality with a total of two channels (T38 or fax board). The demo license version will display a watermark on every fax page.

## Physical (MAC) Address

Please provide your XMediusFAX reseller with your server's MAC address prior to the installation; you will in turn receive a registered license file.

 **Note:** It is possible to install the registered license during the server installation or to process afterwards in the administration interface. In that case, refer to [Installing the License and Setting the Channels](#) on page 30 for more information.

To determine the MAC Address:

1. In a **Command Prompt** window, type: `ipconfig /all` and validate.
2. Copy the value of `Physical Address` for the Network Card presently being used. e.g.: 00-20-18-88-D2-BA.

## Floating Licence Scheme

XMediusFAX Floating License allows the Driver, SMTP Gateway, XML Gateway and Rasterizer components to be installed on any server. Although each of those components will register to a centralised floating license scheme controlled by the FaxManager. In turn the FaxManager is restricted to work on servers with specific MAC. The number of running instances of the SMTP Gateway, XML Gateway, Rasterizers and Driver Channels is limited by the license.

Channels are limited by two properties:

- total number of channels throughout the system (the channel property in the License file),
- total number of channels per type throughout the system (T38 and fax board channels properties in the License file).

The number of channels is set in the administration interface for XMediusFAX. For more details, see the Administration Guide.



## Chapter 2


## Installation Requirements

### Server Requirements


#### Hardware Configuration Requirements


Minimum recommended configuration:

System Channels	OS Environment	Main Server CPU	Main Server Memory	Main Server Hard Disk	Main Server Network
Less than 48	Virtual or native	Pentium Core2	1 GB	SATA-II	100 Mbps
Between 49 and 240	Virtual or Native	Pentium Core2	2 GB	SAS/SCSI-II	100 Mbps
Between 241 and 480	Native	Pentium Core2 Quad	4 GB	SAS/SCSI-II	100 Mbps
Between 500 and 960	Native	Dual Pentium Core2 Quad	8 GB	SAS/SCSI-II	1 Gbps
Over 960	Contact our sales engineering group				

 **Note:** Most fax boards are full-length cards that require full-length PCI slots. The fax boards supported by XMediusFAX are listed in section: [Supported Fax Boards](#) on page 6.

- System requirements are based on a 50% inbound / 50% outbound traffic. Faxes are assumed to have 3 pages. Supplementary distributed rasterizer & gateway may be required depending on the traffic shape.
- Systems can be configured in a cluster configuration where the channels are distributed among the 2 clustered servers or in single server configuration. Single server configurations are limited to 480 channels.
- It requires about 420 GB to store 1,000,000 outbound faxes (Assuming single recipient fax with a 200KB word document, one 50KB cover sheet, resulting in a 150 KB tiff) and the SQL database will require 20 GB for the fax records & indexes.
- It requires 170 GB to store 1,000,000 inbound faxes (Assuming 3 page 150 KB faxes) and the SQL database will require 20 GB for the fax records & indexes.
- 1,000,000 faxes represent about 8 months of continuous 8h/5h traffic on single T1 PRI.
- As a rule of thumb, 1 rasterizer is needed by full outbound T1 PRI.
- All hardware and storage requirements are given as guidelines and may vary based on traffic shape.

 **Note:** All these performance estimations are given for a system using the V.17 communication standard.


 **Important:** The machine where the fax server is installed must be also equipped with an ethernet card.

## OS Configuration Requirements

XMediusFAX must be installed on servers supporting any of the following Operating Systems:

- Windows 2008 R2 (includes IIS 7.5)
- Windows 2008 64-bit or 32-bit
- Windows 2003 R2 + updates (including Microsoft KB 971812) and virtual memory usage activated

XMediusFAX also requires IIS (for the supported versions of IIS, see [Other Supported Software](#) on page 6).

 **Note:** Do not install XMediusFAX on a server that is running another fax server solution, even while you're testing the product.


## Virtualization Software

- VMWare
- Microsoft Hyper-V (Windows 2008)
- Xen Server 5.0 (Citrix)

## Other Supported Software

- For the IIS-Tomcat Redirector (see [IIS Redirector](#) on page 26):

- Internet Information Services (IIS) 7.5 / 7.0 / 6.0

 **Note:** During the installation of XMediusFAX, the `C:\INETPUB\default.htm` file is replaced, which will cause any IIS based application that was already running on the server to break.


- For the Rasterizer module:

- Microsoft Office 2010 (64-bit and 32-bit) / 2007 / 2003 / 2000
- OpenOffice.org 3.1+
- Microsoft Internet Explorer 8.0

## Supported Mail Servers

In the corporate environment, XMediusFAX currently supports these mail servers:

- Microsoft Exchange 2010 / 2007 / 2003
- Lotus Domino 8.5 / 8.0 / 7.0
- SMTP-compliant mail servers

 **Note:** Integrating Exchange or Domino with XMediusFAX allows the use of specific forms and features that are useful for the faxing process.

# Communication Peripherals


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## Supported Fax Boards

Brand	Product Family	Line Type	PCI Type
Brooktrout	TR1034	Analog Loopstart	PCIe/PCIx
Brooktrout	TR1034	Analog & DID Combo	PCIe/PCIx



Brand	Product Family	Line Type	PCI Type
Brooktrout	TR1034	T-1 PRI/RB	PCIe/PCIx
Brooktrout	TR1034	E-1 PRI/RB	PCIe/PCIx
Brooktrout	TR1034	BRI (Euro ISDN)	PCIe/PCIx
Brooktrout	TruFax	BRI (Euro ISDN)	PCIx
Brooktrout	TruFax	Analog Loopstart	PCIe/PCIx
Eicon	Diva Server	BRI (Euro ISDN)	PCI
Eicon	Diva Server	T-1 E-1 PRI/RB	PCI & PCIe
Eicon	Diva Server	Analog Loopstart	PCI

 **Note:** Before installing XMediusFAX with a fax board, you must install and configure the Driver of the concerned fax board:

- For a Brooktrout fax board, you can find this Driver in the 3rd\dialogic\_brooktrout folder from the distribution media: `boston.msi`.
- For an Eicon Diva fax board, you can download this Driver from the Dialogic Website: <http://www.dialogic.com/support/downind.aspx>. The minimum version to install is: *Diva System Release 8.5WIN SU4*, available for 32-bit and 64-bit versions of Windows.

## Supported T.38 (VoIP) Gateways

Table 1: VoIP Gateways

Supplier	Model	Supported Signaling Protocol
AudioCodes	MediaPack 11x Analog; Mediant 600,1000 and 2000; TrunkPack-260 Digital	SIP
Avaya	G350, G450, G650 and G700 Media Gateways	H323
Cisco	1700, 1800, 2600, 2800, 2900, 3600, 3700, 3800, 3900, 7200, 7300 and 7600 CMM Series; AS5300, AS5400 and AS5800 Series	SIP/H323
Dialogic	DMG 2030 and 4030	SIP

Table 2: IP PBX

Supplier	Model	Supported Signaling Protocol
Alcatel	OmniPCX Enterprise 8.0, 9.0 and 9.1.x; OmniPCX Office 8.0	SIP
Avaya	Avaya Communication Manager 3.1, 4.1, 5.0 and 5.2.1	H323
Cisco	Cisco Unified Communication Manager 4.2, 5.1, 6.1, 7.0 and 8.0	SIP/H323

 **Note:**

- Supported Cisco VoIP Gateway must be running an IOS that includes the feature set T.38 Fax Relay for VoIP H.323/SIP/MGCP. It is recommended to use Cisco's IOS feature Navigator to determine which IOS contains this feature set for your VoIP Gateway (<http://tools.cisco.com/ITDIT/CFN/jsp/index.jsp>).

- The current IOS releases of 12.3.x and 12.4.x all support the T.38 Fax Relay for VoIP H.323/SIP feature, however if you are using CCM or CUCM with MGCP gateway, recommended IOS version for your gateway is 12.4.10 or higher.
- The Cisco VoIP Gateway must also possess sufficient DSP resources to handle the desired faxing volume. Please contact your Cisco Vendor to verify this considering that a T.38 Fax Call is considered a Medium Complexity Call.

## ***Supported MFPs***

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XMediusFAX can be integrated with most multifunction printers (MFPs). This support allows users to fax scanned documents, simply by entering a fax number on the MFP or minimally allow the users to email scanned documents to an address reserved for the fax system.

The following requirements must be met in order to send faxes from MFPs:

- The MFP must support the ITU T.37 specification
- The SMTP Gateway component must be licensed, installed and properly configured

All the following MFPs are compatible with XMediusFAX:

### **SAGEM**

- MF4690n
- MF5481n
- MF5680n/dn
- MF5890dn/bdn

### **OKI**

- B4545 MFP
- B2540 MFP

### **Hewlett-Packard**

- HP 9100C

### **Xerox**

- Document Centre™ 470 Digital Copier
- Document Centre™ 460 ST
- Document Centre™ 265 ST
- Document Centre™ 255 ST
- Document Centre™ 240 ST

## ***Client Requirements***

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### **Hardware and OS Client Requirements**

**Hardware:** any Pentium-class processor with 256 MB RAM.

**Operating System:** any of the following OS, depending on the case:

- For Terminal Services: Windows (Terminal Server) 2008 R2 (64-bit) / 2008 / 2003
- For Workstation editions: Windows 7 / Windows Vista / XP


### Supported Mail Clients

Any SMTP based messaging system such as:

- Microsoft Outlook 2010 (64-bit and 32-bit) / 2007 / 2003 / XP

 **Note:** If you are going to use the Outlook Forms with Outlook versions older than 2007, the “Collaboration Data Objects” (CDO) component of Outlook must be installed.

- Windows Mail
- Lotus Notes 8.5 / 8.0 / 7.0

 **Note:** Customers using the XMediusFAX Custom Outlook Forms must use PDF-based notifications along with Adobe Acrobat Reader v6.0+ as TIFF-based notifications are not supported in that specific context.

### Supported Web Browsers for the Fax Web Access Feature

- Microsoft Internet Explorer 8.0+
- Mozilla Firefox 3.6+
- Google Chrome: all latest versions
- Apple Safari 5.x+

### Supported Productivity Suites for Fax Utilities (Fax Macros, Print-to-mail...)

- Microsoft Office 2010 (64-bit and 32-bit) / 2007 / 2003 / XP / 2000
- OpenOffice.org 3.4 / 3.2 / 3.1 / 3.0 / 2.4

 **Note:** OpenOffice.org 3.3 is not supported.




## Chapter 3

## Server Applications: Installation

### Installation Process

This section details typical first-time installations of the XMediusFAX server applications, with the T.38 protocol or a fax board.

 **Note:** At least one server installation must precede the installation of any gateway or client component. The installation procedure generates a log file which can be found in `C:\Program Files\XMediusFAX\Trace`. The name of the file is `XMInstallLog.log`. Each subsequent installation of XMediusFAX modules appends to this file.

#### Installing XMediusFAX with a Fax Board


If you are going to install XMediusFAX with a fax board, the board must be already assembled in the computer that will host the fax server. Also, the correct Driver must be installed and configured prior to the XMediusFAX installation:

- For a Brooktrout board, go to the `3rd\dialogic_brooktrout` folder from the distribution media and run the `boston.msi` file, then configure the Driver using the installed software.
- For an Eicon Diva board, download the Driver from the Dialogic Website (<http://www.dialogic.com/support/downind.aspx>), install it and then configure it using the installed software. The minimum version to install is: *Diva System Release 8.5WIN SU4*, available for 32-bit and 64-bit versions of Windows.

#### Precision about MS Office Installation


Installing any version of Microsoft Office after you have installed XMediusFAX will re-assign file associations. This specifically makes reference to the installation of a document rasterizer, in which case `.rtf` files will be associated with Word. To properly rasterize RTF files, XMediusFAX requires that these files be associated with Wordpad. If you have installed Microsoft Office after installing XMediusFAX, execute the following steps to restore the proper file associations.

1. Navigate to this folder: `Program Files\XMediusFAX\bin\util`.
2. Execute `rtf.reg`.

 **Note:** Office Assistant can interfere with rasterization and should not be installed. If it is present, it should be uninstalled.

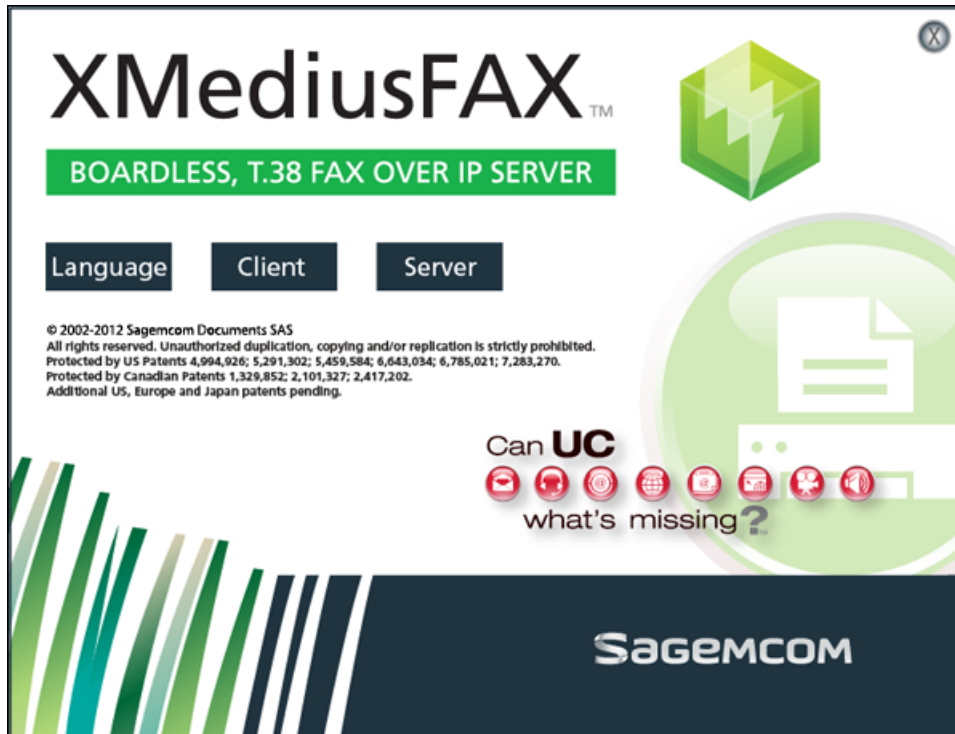
## Server Installation


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 **Note:** If you are installing XMediusFAX with a fax board, please refer first to section: [Installation Process](#) on page 11.

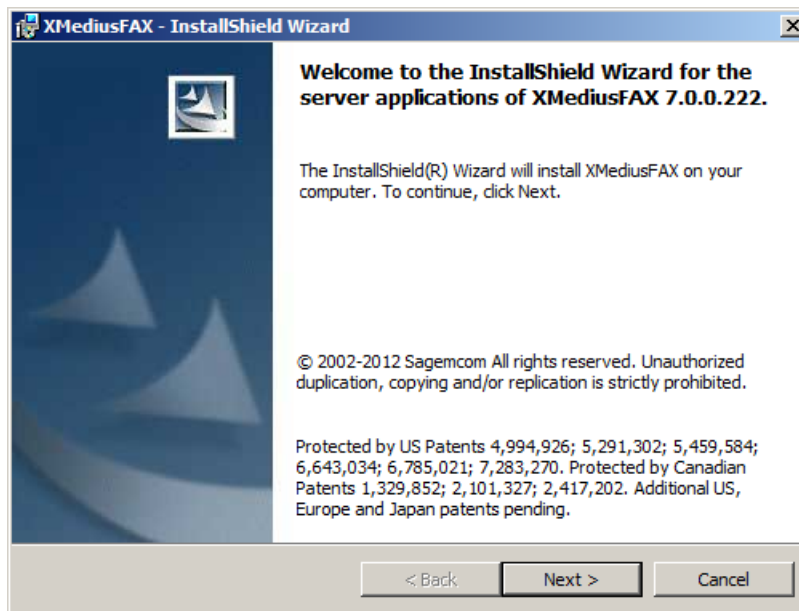
1. Initiate the installation using the Installation Wizard:

a) From the root directory of the XMediusFAX distribution media, double-click `Setup.exe`.



 **Note:** You can here select the language that will be used by the wizard during the installation.

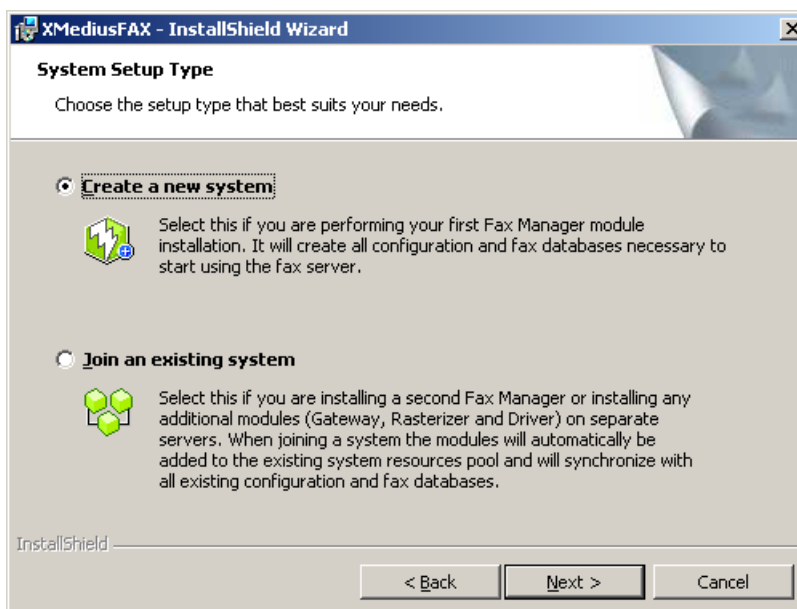
b) On the splash screen, click **server**.




c) Follow the Wizard instructions (each time click **Next**), starting with:

- License Agreement (acceptance required for installing)
- Destination Folder (XMediusFAX files installation path)

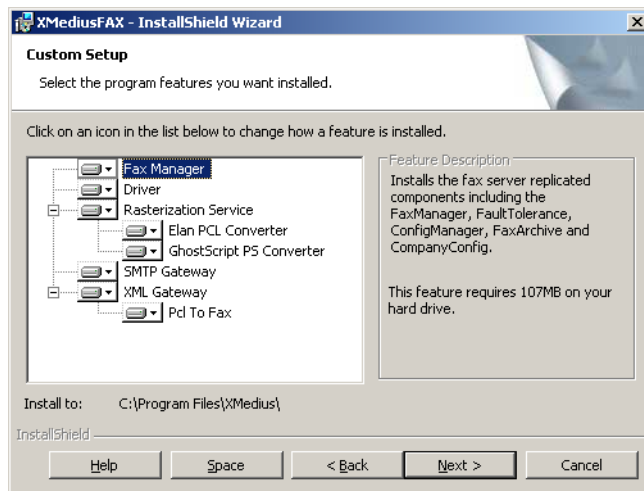
## 2. Choose the System Setup Type:



Leave the **Create a new system** option selected, as you are installing XMediusFAX for the first time.

 **Note:** The **Join an existing system** can only be used if you are extending a system that is already installed, in order to add redundancy to some modules.

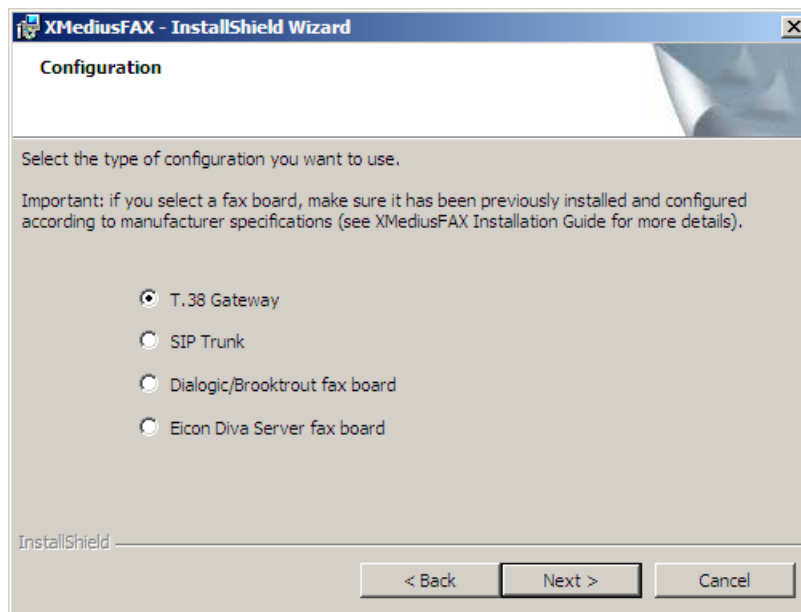
## 3. Choose the server components to install or not:



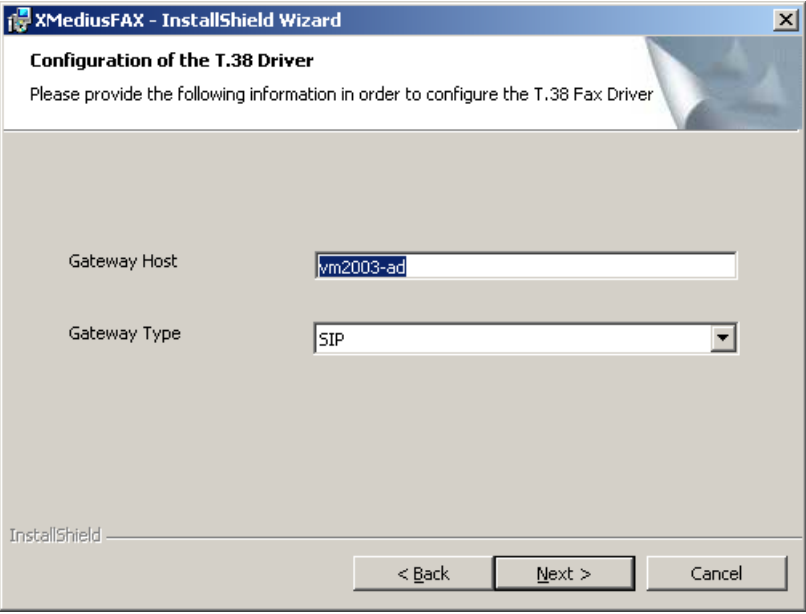
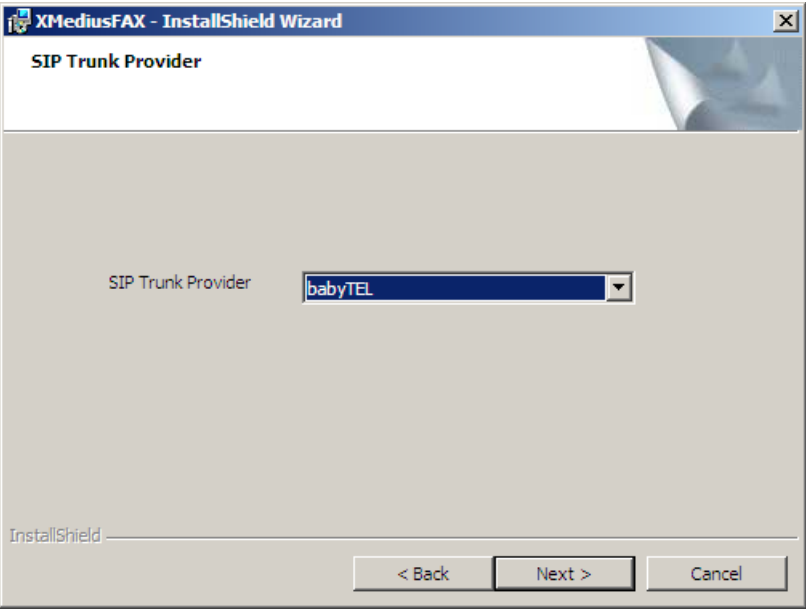

**Note:** The server applications are all selected by default.

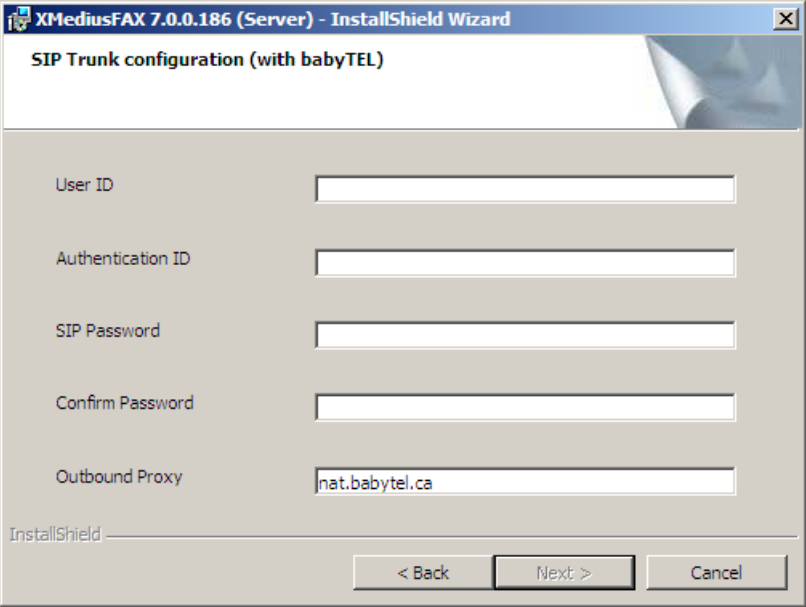
**Restriction:** Depending on your license, some features may remain disabled, even if you install them here. Please refer to the *XMediusFAX Administration Guide* for more details on these features.

4. Select the type of fax driver installation you need to perform:

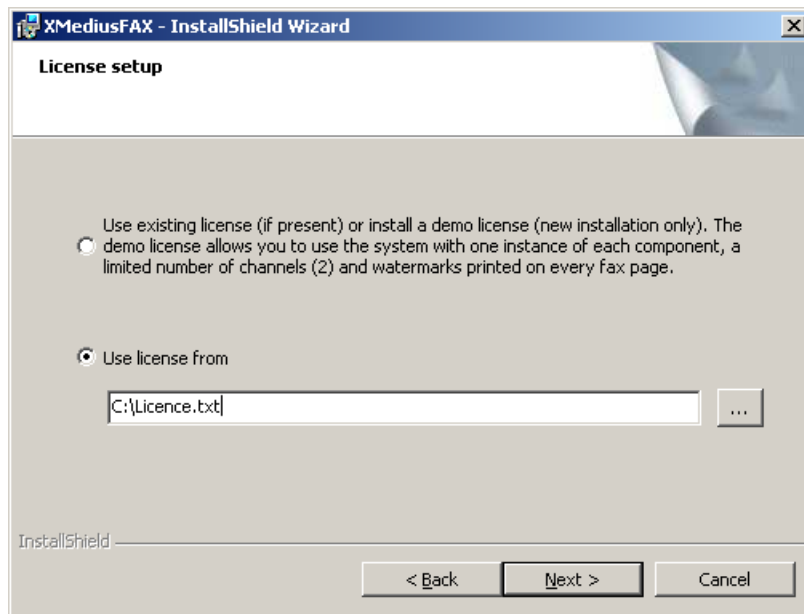





Option	Description
<b>T.38 Gateway</b>	<p>Boardless fax driver using T.38 protocol with basic gateway configuration.</p> <p>Once you click <b>Next</b>, you need to enter some specific information:</p>  <ul style="list-style-type: none"> <li>• <b>Gateway Host:</b> Host Name of the gateway that will be used as interface between XMediusFAX and the telephone network. The default value is the Host Name of local computer.</li> <li>• <b>Gateway Type:</b> Protocol (SIP or H.323) used by the above specified gateway. The default value (SIP) reflects the type of the gateway residing on the local computer.</li> </ul>
<b>SIP Trunk</b>	<p>Boardless fax driver using T.38 protocol via a specific SIP Trunk provider.</p> <p>Once you click <b>Next</b>, you need to enter some specific information (2 screens):</p>  <ul style="list-style-type: none"> <li>• <b>SIP Trunk Provider:</b> The company that will provide you the SIP Trunk.</li> </ul> <p> <b>Important:</b> You must already have obtained a SIP Trunk account from this company.</p>

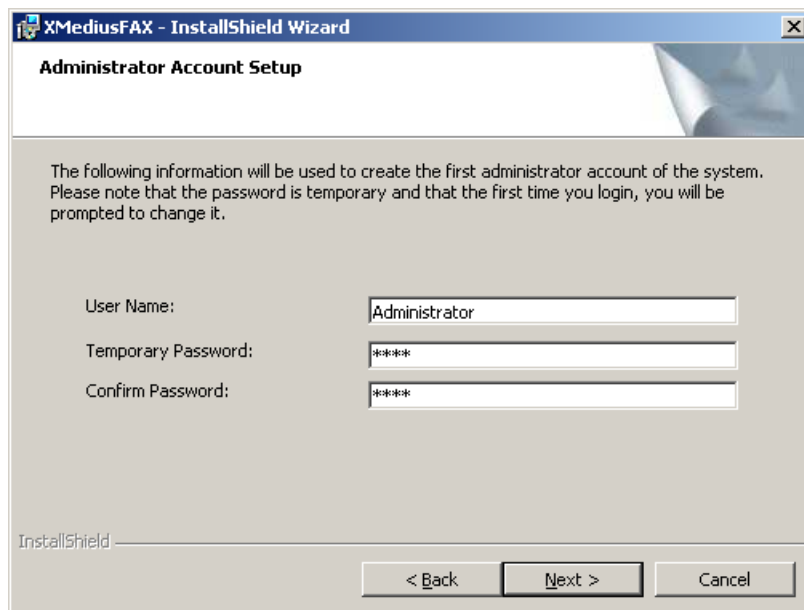
Option	Description
	 <p><b>Note:</b> You should have received all this information from your SIP Trunk provider:</p> <ul style="list-style-type: none"> <li>• <b>User ID</b></li> <li>• <b>Authentication ID</b></li> <li>• <b>SIP Password</b> (to be entered twice)</li> <li>• <b>Outbound Proxy</b></li> </ul> <p><b>Remember:</b> All this information will be managed by the system to properly configure SIP Security and SIP Peer within the XMediusFAX Driver properties. For more details on these subjects, see the <i>XMediusFAX Administration Guide</i>.</p> <p><b>Attention:</b> Make sure to fill these fields with the exact strings communicated by your SIP Trunk provider: any misspelling would force you to manually reconfigure the Driver, which would be far more complicated than here.</p> <p>Though, if such a situation would happen, it is recommended to uninstall the Fax Driver and reinstall it as you are currently doing. To do this, simply use the current XMediusFAX installer to modify the installation: one time by unselecting the <b>Driver</b> component, and then again by reselecting it (and reconfigure it using the above screens).</p>
<b>Dialogic/Brooktrout fax board</b>	<p>Fax board driver for Dialogic/Brooktrout device.</p> <p><b>Note:</b> Before clicking <b>Next</b>, you must be sure that you already installed and configured the Boston pnp Driver. If it is not the case, cancel the XMediusFAX installation and refer to <a href="#">Installation Process</a> on page 11.</p>
<b>Eicon Diva Server fax board</b>	<p>Fax board driver for Eicon Diva device.</p> <p><b>Note:</b> Before clicking <b>Next</b>, you must be sure that you already installed and configured the Eicon Diva Driver. If it is not the case, cancel the XMediusFAX installation and refer to <a href="#">Installation Process</a> on page 11.</p>

5. Choose the license to use for the installation:




- If you have a license, select the **Use license from** option, then **Browse** to the location where the license file can be found and select it;
  - Otherwise leave the **Use existing license (if present) or install demo license (new installation only)** option selected.
-  **Note:** To manually install the license, see [Installing the License and Setting the Channels](#) on page 30.

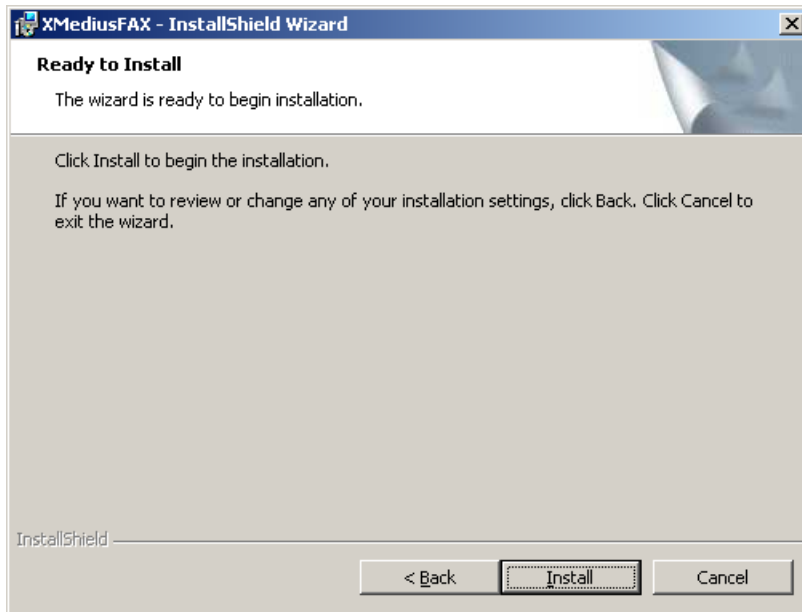
6. Setup the administrator account you will use to login to the XMediusFAX administration interface:



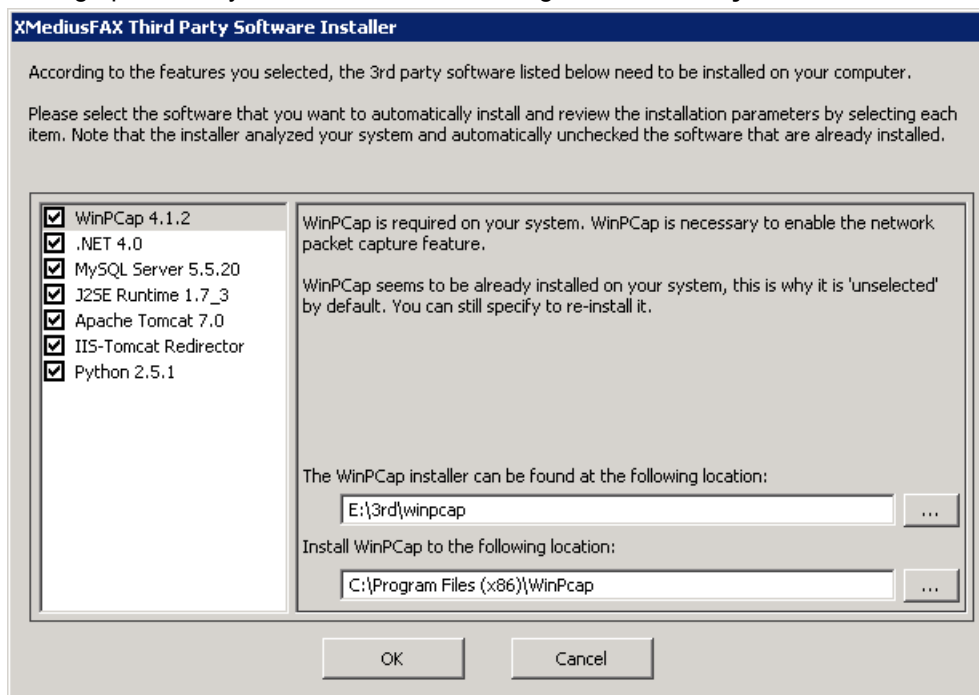
Enter the credentials for the main System Administrator account. The default proposed name is Administrator.


-  **Note:** The password is temporary; you will have to change it at first login.

7. Start the installation:




- a) Click **Install**.
- b) Manage preliminary software installation using the **Third Party Software Installer**:



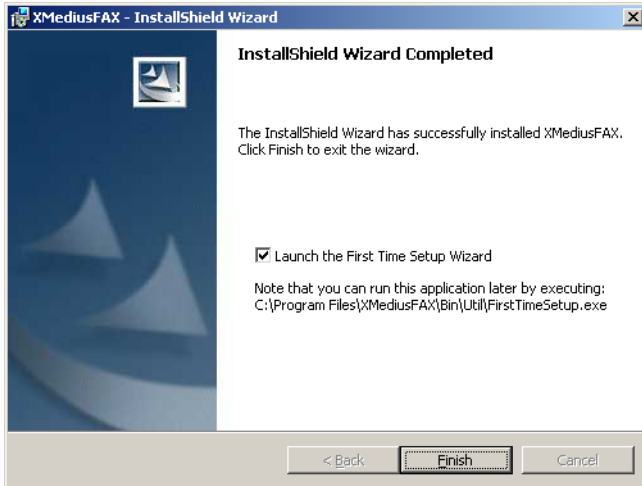
 **Note:** Third Party Software are software packages required by several components of XMediusFAX to function as designed. You will be advised on which packages need to be installed. See [Third Party Software](#) on page 24 for details (especially for IIS-Tomcat Redirector: [IIS Redirector](#) on page 26).

- c) Click **OK** to proceed.


 **Note:** If you checked **WinPcap**, follow the procedure of the **WinPcap Installer** that will pop up.

- d) Click **Done** once the Third Party Software installation is complete.  
InstallShield now starts XMediusFAX installation, which will take a few minutes.

## 8. Finalize the installation:




a) Leave the **First Time Setup Wizard** box checked if you wish to benefit from a basic automatic configuration of your fax system (see [Site Configuration: Wizard](#) on page 19).


 **Note:** If you choose to uncheck this box, you can use the Basic Configuration method detailed on [Basic Site Configuration](#) on page 31.

b) Click **Finish**.

## Disabling the Microsoft SMTP Service

---

 **Note:** This procedure can only be done after installing the server applications.

 **Note:** Since XMediusFAX SMTP gateway service uses system port 25, the same port as Microsoft's SMTP service, conflicts may arise. Disable Microsoft's SMTP service before starting the XMediusFAX SMTP gateway service.

1. In Windows, click **Start ► Settings ► Control Panel**.
2. In the **Control Panel**, double-click **Administrative Tools**, then **Services**.
3. Right-click on the **Simple Mail Transport Protocol (SMTP)** service and select **Stop**.
4. Set the **SMTP** service to **Disable**.
5. Start the **XMSMTPGateway** service. (By default the **SMTP** service is set to **Automatic**).
6. Close the **Services** window and the **Control Panel**.


## Site Configuration: Wizard

---

The role of the First Time Setup Wizard is to perform the minimal system configuration so that you can begin faxing immediately. The Wizard performs the tasks listed below:

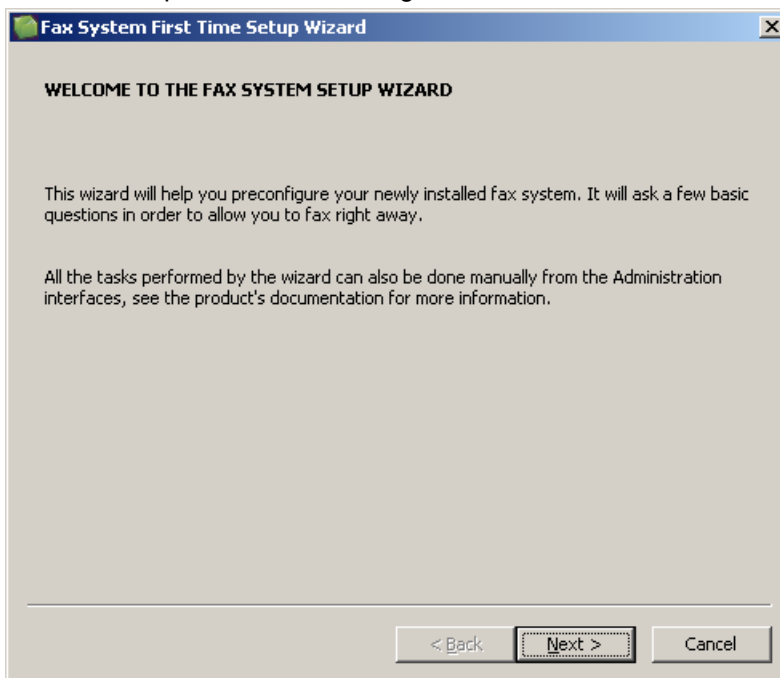
- Creates a Site
- Sets the Site QOS to 0/0/240
- Sets the XML Poll folder to the Site Name
- Removes SMTP Messages Require Authentication from default profile


- Sets the CSID of the default profile to the Site name
- Creates the User and sets its Password
- Sets the Site SMTP Postmaster to the Administrator's SMTP address
- Sets the Site Routing Table to route to the User
- Sets the System Routing Table to route to the Site, with CSID set to Site Name
- Sets the Alert Notification to go to the Administrator's SMTP address through the specified Mail Relay Server
- Sets the SMTP Gateway (if installed) Mail Relay Server
- Produces a summary and instructions on how to use the system. This summary is also automatically saved to a file

 **Note:** If you do not choose to use the Wizard, all these configurations can be managed from the XMediusFAX Administration interface. However, the Administrator has the option to run this application at a later time from the XMediusFAX directory by executing the following file:

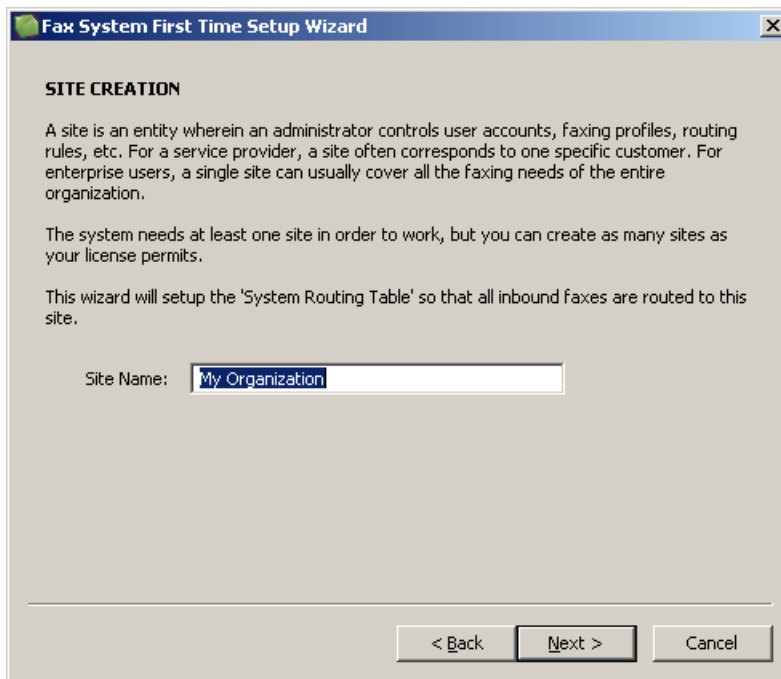
```
[install_path]\XMediusFAX\Bin\Util\FirstTimeSetup.exe
```

The Wizard opens on the following screen:

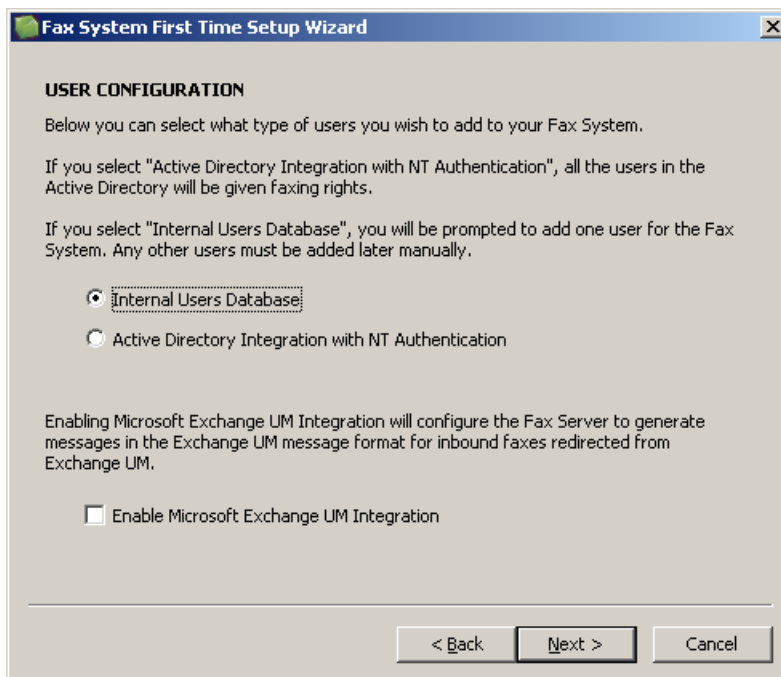


 **Note:** The Wizard will give you instructions at each step of the setup. Please read them carefully each time before continuing.

1. Click **Next**.




2. If needed, change the **Site Name** for the site that will be created.  
The default name is `My Organization`.
3. Click **Next**.



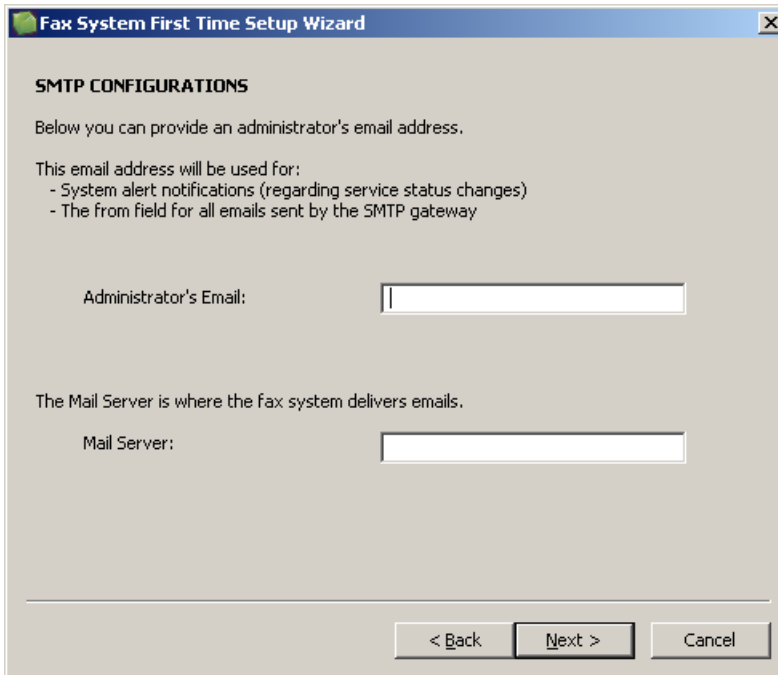
4. perform the user configuration:
  - a) Select the type of users you wish to add to your fax system:
    - The **Internal Users Database** option will allow you (later, through this wizard) to create a first user in the internal users list of XMediusFAX. You will be able to add other internal users afterwards, through the administration interface.
    - The **Active Directory Integration with NT Authentication** option will allow you (later, through this wizard) to set connection parameters in order to give faxing rights to all users in your Active Directory.

- b) If you are going to perform the Microsoft Exchange UM integration, check the box.

The Wizard will add an **Exchange UM** Rule to the Incoming Routing Table of the created site and will also configure the **Basic** Mail Notification Profile to use the Exchange UM form for notifications.


 **Note:** This selection requires the creation of a new Receive Connector on your Exchange Server (see [Configuring the Mail Notification Profile for UM Integration](#) on page 65). For more information on Exchange UM integration, see [Integrating XMediusFAX as Fax Solution for MS Exchange UM](#) on page 61.

5. Click **Next**.



The screenshot shows the 'Fax System First Time Setup Wizard' window, specifically the 'SMTP CONFIGURATIONS' step. The window has a title bar with the text 'Fax System First Time Setup Wizard' and a close button. The main content area is titled 'SMTP CONFIGURATIONS' and contains the following text: 'Below you can provide an administrator's email address.' followed by 'This email address will be used for:' and a bulleted list: '- System alert notifications (regarding service status changes)' and '- The from field for all emails sent by the SMTP gateway'. Below this is a text input field labeled 'Administrator's Email:'. Further down, it says 'The Mail Server is where the fax system delivers emails.' followed by a text input field labeled 'Mail Server:'. At the bottom of the window are three buttons: '< Back', 'Next >', and 'Cancel'.

6. Enter the **Administrator's Email** and the hostname of the **Mail Server** of your company.

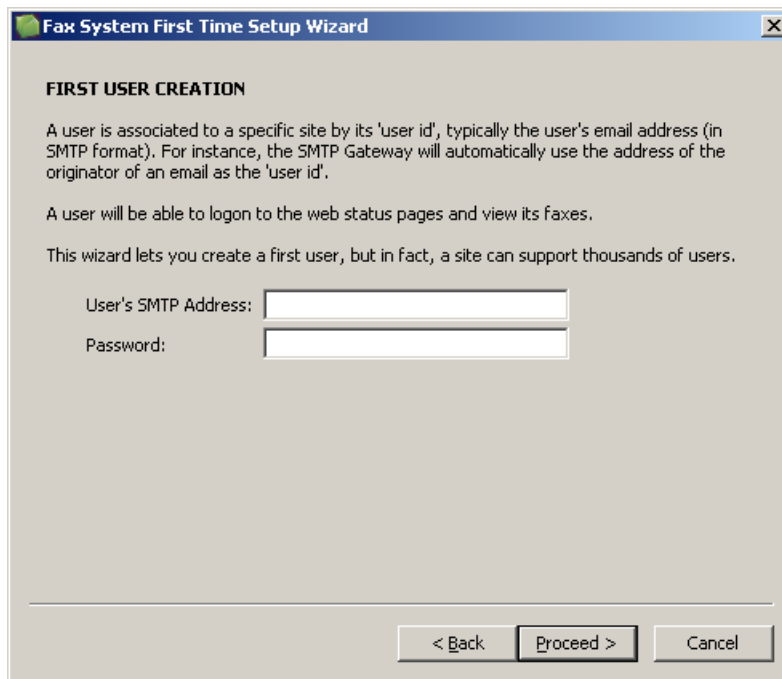
 **Note:** If you selected **Active Directory Integration with NT Authentication** during the user configuration, the **Administrator's Email** must refer to a valid user in your Active Directory.

7. Click **Next**.

Depending on the selection of users type you made during the user configuration:

- If you selected **Internal Users Database** during the user configuration, you can now enter a first user for your fax system.





**FIRST USER CREATION**

A user is associated to a specific site by its 'user id', typically the user's email address (in SMTP format). For instance, the SMTP Gateway will automatically use the address of the originator of an email as the 'user id'.

A user will be able to logon to the web status pages and view its faxes.

This wizard lets you create a first user, but in fact, a site can support thousands of users.

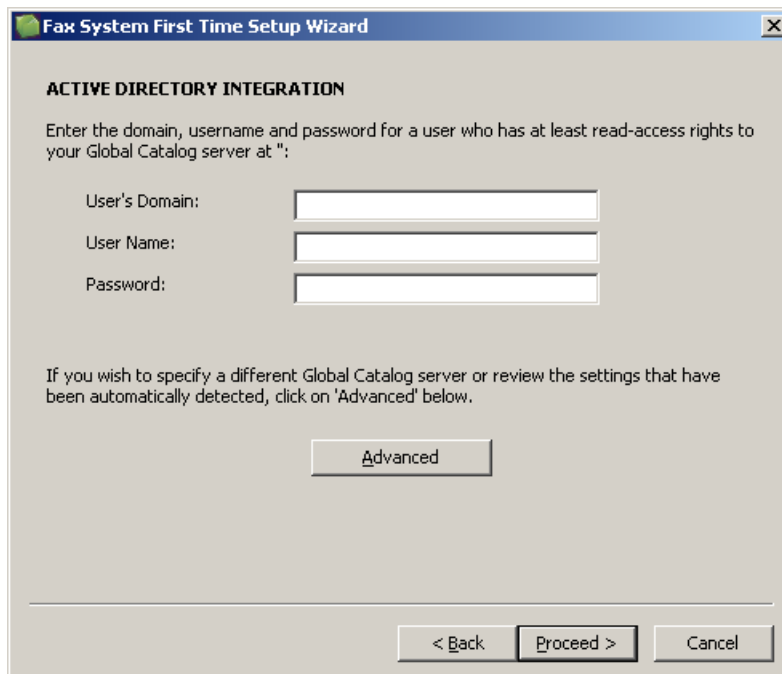
User's SMTP Address:

Password:

< Back   Proceed >   Cancel

Enter the **User's SMTP Address** and a **Password** for this user.

- If you selected **Active Directory Integration with NT Authentication** during the user configuration, you can now configure the Active Directory Integration:



**ACTIVE DIRECTORY INTEGRATION**

Enter the domain, username and password for a user who has at least read-access rights to your Global Catalog server at ":

User's Domain:

User Name:

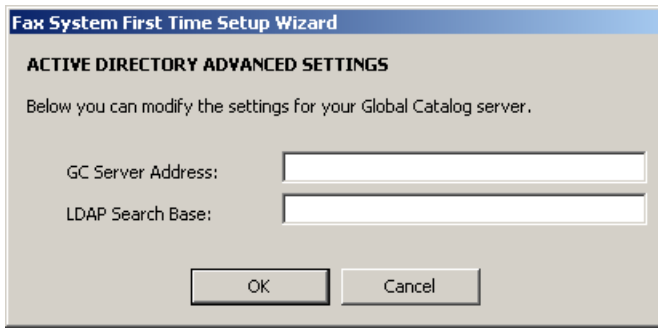
Password:

If you wish to specify a different Global Catalog server or review the settings that have been automatically detected, click on 'Advanced' below.

Advanced

< Back   Proceed >   Cancel

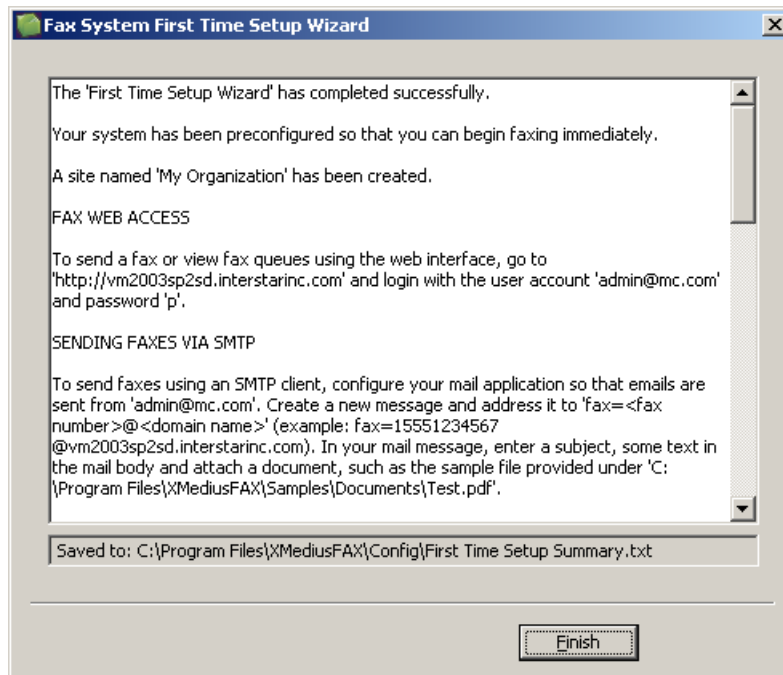
- Enter the **User's Domain**, the **User Name** and the **Password** of a user who has at least read access rights to your Global Catalog server.
- If you need to change the Global Catalog server settings, click the **Advanced** button.



c) Enter or modify the **GC Server Address** and **LDAP Search Base** for your Global Catalog server and click **OK**.

8. Click **Proceed**.

The Configuration Status Window opens, and then closes automatically when the installation is done.




9. Click **Finish**.

## Third Party Software

Prior to installing XMediusFAX server components, a software analyzer / installer tool ensures that critical third-party software have been correctly installed as required by the selected XMediusFAX components. This gives more flexibility and control over the deployment and its results.

You will find in the following sections a quick description of each third-party software that may be automatically installed during the server applications installation of XMediusFAX:

- [MySQL](#) on page 25
- [J2SE Runtime \(JRE\) & J2SE Development Kit \(JDK\)](#) on page 25
- [Apache Tomcat](#) on page 26
- [IIS Redirector](#) on page 26
- [Python](#) on page 26
- [WinPCap](#) on page 27

-  **Note:** Another software, **TransymOCR**, available in the `3rd\transymocr` folder of the distribution media, must be manually installed if you wish XMediusFAX to be able to perform OCR routing (depending on your license): see [OCR Routing: Installing TransymOCR](#) on page 27.



## MySQL

---

MySQL is used by the `XMFaxArchive` and `XMCoConfig` services of the XMediusFAX software. MySQL is required as the back-end database server to store data and some configurations.

If the administrator selects to install it, default parameters will be used i.e., it will listen on port 3306 and a service named `MySQL5` will be created and set to start automatically.


Version Number	Default Installation Path
5.5.20	C:\Program Files\MySQL\MySQL Server 5.5

-  **Note:** The administrator must be aware of possible conflicts if another version of MySQL service is running. If the administrator selects to install MySQL, the previous MySQL service will be stopped and replaced by the new version.
-  **Restriction:** In a context of XMediusFAX upgrade, MySQL cannot be automatically upgraded from 5.0 to 5.5. Though the newer XMediusFAX version can indifferently continue to work with MySQL 5.0, you may still want to upgrade MySQL to 5.5: a manual procedure (available in KB Article #314893) can be performed, preferably under supervision of a technical support specialist.


## J2SE Runtime (JRE) & J2SE Development Kit (JDK)

---


JRE is required by the `XMFaxArchive` and `XMCoConfig` services and by Apache Tomcat (XMediusFAX web components). JRE provides a built-in compiler used by Tomcat.

-  **Note:** If JavaAPI is being installed then JDK and JRE will both be installed. The Java Development Kit is required to compile JSP files. If you install it, this version of the JDK will be set as the current running version on your computer. The JDK installer cannot be run a second time. To reinstall it, the administrator will have to uninstall it first.

The Java Runtime Environment is required to run Java-based applications. If you select to install it, this version of the JRE will be set as the current running version on your computer. Care must be taken to avoid conflicts with other installed versions of this software.

-  **Note:** If this version of JRE is already installed on the computer, the JRE installer cannot be run a second time. If the administrator wants to reinstall it, the previous version will have to be uninstalled.

Name	Version Number	Default Installation Path
JRE	1.7.0_03	C:\Program Files\Java\jre1.7.0_03
JDK	1.7.0_03	C:\Program Files\Java\jdk1.7.0_03

-  **Note:** JDK may be installed in the Client install, depending on the selected applications.


## Apache Tomcat

---

Apache Tomcat is required to run the JSP scripts for the web components of the XMediusFAX software and is dependent on JRE to run. Therefore if the Fax Manager feature of XMediusFAX has not been selected for installation, the web components will not be installed and neither Tomcat nor JRE will be available for selection in the Third party Installer.

If however, the administrator selects to install the Fax Manager feature, Tomcat and JRE will be displayed in the Third party Installer. When Tomcat is selected, the default parameters will be used, i.e. it will listen on port 8080 and a service named `Apache Tomcat` will be created and set to start automatically.

Version Number	Default Installation Path
7.0.26	C:\Program Files\Apache Software Foundation\Tomcat 7.0


 **Note:** Apache Tomcat is required to run the web components. If this version has already been installed, the installer will not select it by default. The administrator can opt to reinstall it. Doing so will stop the `Apache Tomcat` service and restart it after installation. If another version of Tomcat is found, the older version of the Tomcat service will be stopped and set to a disabled state. The new Apache Tomcat service will be installed and started.

## IIS Redirector

---

The IIS Redirector (an ISAPI filter) is used to hook IIS to Tomcat. Its function is to allow the use of IIS as the Web Server, but redirects all Java-related execution to Tomcat. If the administrator selects to install the redirector, a virtual folder and an ISAPI filter named `jakarta` will be added to the IIS “Default Web Site”.

ISAPI Redirector will be installed in the `Tomcat` folder.


 **Note:** The installation of the IIS Redirector will not be selected if IIS is not installed on the computer. Also, if you installed **IIS 7**, you must additionally install the following **Role Services** of the **Web Server (IIS)**:

- **IIS6 Metabase Compatibility**
- **ISAPI Filters**
- **ISAPI Extensions**
- **Windows Authentication** (optional component required to use NT authentication for the Web client)

## Python

---

Description of the Python language and of its use in XMediusFAX.


 **Note:** Depending on your license, the XMediusFAX feature associated to this third party software may be disabled.

Python is a dynamic object-oriented programming language. It is used by XMediusFAX to allow the creation and use of more flexible features at two levels of the process of faxes:

- Customized rules for the fax incoming routing table
- Customized destinations for the fax notifications

It will be automatically installed through the server and client installations, depending on the modules selected to be installed.

Version Number	Default Installation Path
2.5.1	C:\Python25

 **Note:** Python may be installed in the Client install, depending on the selected applications.

For more information on the Python language, see the website: <http://www.python.org>.

## WinPCap


---

WinPCap is necessary to enable the network packet capture feature in XMediusFAX. The network packet capture feature enables XMediusFAX to save the communications data between the driver and the gateway, for troubleshooting purposes if problems occur during some of these communications.

Default installation path is: C:\Program Files\WinPcap


## OCR Routing: Installing TransymOCR

---

 **Note:** Depending on your license, the XMediusFAX feature associated to this third party software may be disabled.

For OCR to be available from XMediusFAX, you must install TransymOCR (version 3.0 Pro) on the server:

1. From your server machine, locate the 3rd\transymocr folder on the distribution media.
2. Run `tocrv30pe.exe`.  
TransymOCR installs on your system.

 **Note:** This version is a demo version that will allow rasterization of 100 pages. For further use of this software, you must purchase a license.





## Chapter 4

## Basic Configurations

### Services Rights Configurations


Depending on your needs and on the environment of the Windows Server on which XMediusFAX has been installed, some services of the Fax Server need to be associated with a specific user account for working properly.

 **Important:** Please read the context of all 3 following cases in order to determine which ones correspond to your environment, and perform the related configuration.

Subject	Context	Configuration
MS Office files conversion by the XMediusFAX Rasterization Module	To avoid potential issues with MS Office files conversion by the XMediusFAX Rasterization Module.   <b>Important:</b> This configuration is mandatory, especially when MS Office 2007 (or a more recent version) is installed on the Windows server where XMediusFAX is running.	<ol style="list-style-type: none"> <li>1. Associate the <b>XMDocumentRasterizer</b> service with a Windows admin account: see <a href="#">Associating a Service with a Windows Admin Account</a> on page 29.</li> <li>2. Set a pre-initialized Office environment (using this account): see <a href="#">Setting a Pre-Initialized Office Environment for the Rasterizer</a> on page 30.</li> </ol>
Use of Network Printer/Folder Destinations (managed by the SMTP Gateway)	To allow XMediusFAX SMTP Gateway to send notifications to network destinations (printers or folders).	Associate the <b>XMSMTPGateway</b> service with a Windows Admin domain account: see <a href="#">Associating a Service with a Windows Admin Account</a> on page 29.
XMediusFAX Rasterization Module and SMTP Gateway installed on a 64-bit Windows Server	If both services are installed on the same 64-bit Windows Server.	Associate both the <b>XMDocumentRasterizer</b> and <b>XMSMTPGateway</b> services with the <b>same</b> Windows admin account (see <a href="#">Associating a Service with a Windows Admin Account</a> on page 29).

### Associating a Service with a Windows Admin Account

1. Create an account that has Administrative rights on the Windows server on which the concerned service is installed.

 **Note:** This account can be:


- a domain account, or
- a strictly local account on the server itself.

2. Configure the concerned service to log on using the account you have granted administrative privileges:
  - a) Access the Windows services management interface (i.e. **Start ► Run ► services.msc**).
  - b) Locate the concerned service (e.g. **XMDocumentRasterizer** or **XMSMTPGateway**) and edit its properties.
  - c) Under the **Log On** tab, select **This account** and enter the information of the administrative account you just created.
  - d) Restart the concerned service.

## ***Setting a Pre-Initialized Office Environment for the Rasterizer***

---

1. If you have Office 2007 installed on the server, ensure that you have applied at least Service Pack 1.
2. Log out of Windows and log in using the administrative account that you have set to run the **XMDocumentRasterizer** service (see [Associating a Service with a Windows Admin Account](#) on page 29).
3. Open MS Word and MS Excel to ensure that no Welcome screen or error messages occur.
 

 **Note:** It is not likely that any error will occur; however these applications must not display any prompt message when they are started, otherwise the Rasterizer will not work properly.
4. Once you have resolved any prompt or error messages, reboot the server.


## ***Installing the License and Setting the Channels***

---

How to manually install the license and set the fax driver channels after the server installation.

XMediusFAX offers the possibility to install the license during the server installation. If you did not choose to do so, it is possible to process manually through the administration interface.

1. Log into the fax system administration interface and browse to: **General Settings ► Properties**.
2. Select the **License** tab and click **Update**.
3. Browse for the new license file you received, select it and confirm.
4. Click **OK**.
5. Restart the **XMFaxDriver**.
6. If needed, check and adjust the settings related to your fax channels:
  - **Driver ► Properties ► Options ► T.38 Channel Configuration:** the **Maximum Number Of Channels** must have been automatically updated (by the Driver service restart) in accordance with the new license.
 

 **Note:** If you have more than one driver installed, you can adjust the **Preferred Number Of Channels** for each driver.
  - **Driver ► Channels ► [Channel] ► Properties:** you can set the channel mode (*Receive*, *Send* or *Both*) for each available channel.
  - **Sites ► [Site] ► Properties ► Quality of Service ► Connections:** if you are using more than one site, you can adjust channel quotas for each site.



## Basic Site Configuration

---

This procedure is a list of actions to do in order to basically configure your Site after installing the fax server. To know precisely how to perform them, and for more information about the related concepts, please refer to the *XMediusFAX Administrator Guide*.

1. Log into the administration interface and access the **Configuration** section of your site.
2. In the **Profiles** node, create and setup profiles according to your needs (list of cover sheets, CSID and security).
3. In the **Users** node, create or import users as required.
4. In the **Incoming Routing Table** node:
  - a) Set the properties of the **Default Rule** and enter the address to use for misrouted faxes.  
This is usually the fax administrator's e-mail address.
  - b) Set the incoming routing table by creating and configuring routing rules.  
For example: associate DNIS to a list of destinations, most likely the e-mail address of a user.
5. In the **General Settings** node, access the **Properties**:
  - a) Click the **General** tab to configure the **Incoming Fax Notifications** and the **Rasterization Options**.
  - b) Click the **SMTP** tab to set the **Feedback Address** (in case of transmission failure) for the gateway for SMTP and to add, if needed, **Trusted Mail Servers**.  
The **Feedback Address** is usually the fax administrator's e-mail address.

## Basic System Configuration

---

This procedure is a list of actions to do in order to basically configure the system side of your fax server. To know precisely how to perform them, and for more information about the related concepts, please refer to the *XMediusFAX Administrator Guide*.

1. Log into the administration interface as a system administrator and access the **Configuration** section of the system.
2. In the **Driver ► Channels** node of your host:
  - a) Access the **Properties** of each channel.
  - b) Review the mode settings: **Inbound**, **Outbound** or **Both**.
3. In the **SMTP Gateway** node of your host:
  - a) Access the **Properties**.
  - b) Review the current gateway for SMTP settings.  
We recommend that an external dedicated server be used for relaying mail.
4. In the **Modification Table** node:
  - a) According to your local dial plan, add new items to the table and configure them.
  - b) Setup the modification table to properly handle local calls, then test it.
5. If needed, create a new site and configure its properties.
  - a) For a basic configuration of this site, see [Basic Site Configuration](#) on page 31.
  - b) Add the entry for the new site on the system routing table by specifying the DNIS ranges associated with that site.



## Chapter 5      Secured HTTP (HTTPS) Configurations

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### Secured HTTP (HTTPS) Configurations

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Several XMediusFAX clients use HTTP requests to communicate with the server. This includes:

- The Web clients:
  - Web administration interface
  - Web access for users
- The other Web tools such as:
  - Fax Account Monitoring Spot tool
  - Web Fax Composer printer
- The SendFAX client
- The fax forms for mail clients (Outlook and Notes)

XMediusFAX allows you to secure these HTTP requests by using HTTPS (HTTP with SSL).

This requires a few configuration on both the server and client side (see [Basic Scenario](#) on page 33).

 **Restriction:** This chapter does not apply to HTTPS configuration for the XMediusFAX Web Services. For more information, see the *XMediusFAX Administration Guide*.


### Basic Scenario

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Basically, you have to perform some configuration for allowing the clients to use HTTPS connection: on the server side (through IIS) and on the client side.

1. On the server side:
  - a) Ensure to have IIS installed and properly configured (already working in HTTP).
  - b) Enable HTTPS in IIS (refer to the IIS documentation).

2. Ensure that the certificate of the server is trusted on the client side.

 **Note:** If the certificate is signed by a trusted certification authority that is listed in the environment of the client, the certificate will automatically be trusted by the clients. Otherwise, you will need to add the certificate into the appropriate **Trusted Root Certification Authorities** container.

3. Setup all concerned clients for using HTTPS:

Depending on the client:

Client	Action
Web clients (User and Administrator)	Users will simply use https in the URL field of the Web Browser (instead of http).
SendFAX and other Web tools	Configure https during installation (see <a href="#">Client Applications Installation</a> on page 67), or after (see <i>XMediusFAX User Guide</i> ).
Fax Forms (Outlook or Notes)	Configure https during installation (see <a href="#">SMTP Integration: Overview</a> on page 35).

## Chapter 6


## SMTP Integration

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### SMTP Integration: Overview

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One of the major features of XMediusFAX is to enable users to send and receive faxes as emails directly through their SMTP client. Therefore, it is important to know some details on the way XMediusFAX manages SMTP and about the other features that you can benefit from through SMTP.

 **Note:** Depending on your license, some or all of the SMTP features described here may be unavailable. Please consult your license terms.

In this chapter, you will find:

- Details on the XMediusFAX SMTP Gateway and recommendations about linking it to a mail server (see [The XMediusFAX SMTP Gateway](#) on page 35).
- The procedures and recommendations for integrating Microsoft Exchange as mail server for XMediusFAX (see [Microsoft Exchange Integration](#) on page 37).
- The procedure for installing customized forms for Microsoft Outlook when your deployment includes Exchange as mail server (see [Microsoft Outlook Forms](#) on page 41).
- The procedure for installing a customized composition form for Lotus Notes when your deployment includes Domino as mail server (see [Lotus Notes Form](#) on page 43).
- Recommendations (and procedures) if you wish to use TLS encryption for SMTP with XMediusFAX (see [Using TLS for SMTP with XMediusFAX](#) on page 50).

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### The XMediusFAX SMTP Gateway

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The **XMSmtpGateway** module of XMediusFAX (called SMTP Gateway) has the two usual basic functions of a mail server, allowing the Fax Server to:

- Receive emails from XMediusFAX users in order to convert them into faxes;
- Send emails to XMediusFAX users for notification purpose (including received faxes and fax sending reports).

Therefore, the SMTP Gateway can be directly connected to the outside (for the fax/email needs) and will work basically like a mail server in that case.

However, if you wish to increase security and queues performance when using XMediusFAX, it is highly recommended to connect the SMTP Gateway to a real mail server with which your Fax Server will benefit from many features that are dedicated to emails management. In some cases, you might also benefit from other features that are specific to fax management, like the Microsoft Outlook fax composition and notification forms or the Lotus Notes fax composition form (depending on your license; see [Microsoft Outlook Forms](#) on page 41 or [Lotus Notes Form](#) on page 43 for more information).

To know the benefits related to the use of a mail server for sending faxes or receiving notifications by email, see sections: [Using a Mail Server for Sending Faxes](#) on page 36 and [Using a Mail Relay Server for Receiving Notifications](#) on page 36.

A typical fax server/mail server deployment is described in section: [Fax/Mail Servers Typical Deployment](#) on page 37.

## ***Using a Mail Server for Sending Faxes***


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When a user is sending a fax by email, XMediusFAX finally receives it through its SMTP Gateway (**XMSmtpGateway** module), where the email is converted into a fax.

For this, a direct connection is possible between the user and the SMTP Gateway. However, by inserting a mail server in front of the SMTP Gateway, you can benefit from all special features that such a device can provide, including:

- A more flexible management and a better performance of email queues (suspend or redirect queues, manage simultaneous messages...)
- Spam filtering
- Virus checking

Therefore, it is highly recommended to include a mail server to your deployment if you plan to allow users to send faxes by email. Any mail server can be used for this.

 **Note:** Mail servers like Microsoft Exchange and Lotus Domino can give you access to additional faxing features, depending on your XMediusFAX license (see [Microsoft Outlook Forms](#) on page 41 or [Lotus Notes Form](#) on page 43 for more details).


## ***Using a Mail Relay Server for Receiving Notifications***

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When a user is expecting to receive email notifications (sending reports or received faxes) from XMediusFAX, the SMTP Gateway is able to send these emails to any mail relay server (locally or on the Internet). However, it is highly recommended to insert a corporate mail relay server in front of the SMTP Gateway, in order to manage locally all the emails sent by the SMTP Gateway before relaying them to the outside. Additionally, you can benefit from all special features that such a device can provide, allowing:

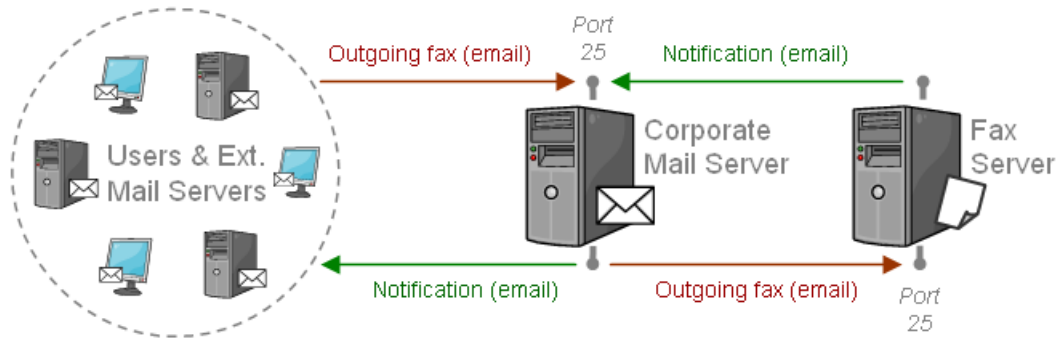
- To eliminate the effect of communications delays (from the Fax Server perspective) with external servers (especially through the Internet)
- To receive NDR (Non Delivery Report) messages in case the mail server would not be able to deliver some notifications sent by the Fax Server

If you plan to allow users to receive email notifications and if you have already a corporate mail system, you should use it for relaying all emails sent by the SMTP Gateway. Any local mail relay server can be used for this too.

 **Note:** Mail servers like Microsoft Exchange can give you access to additional notification features, depending on your XMediusFAX license (see [Microsoft Outlook Forms](#) on page 41 for more details).

## Fax/Mail Servers Typical Deployment

Typically, the mail server used to transmit emails from users to XMediusFAX and the mail relay server used to relay notifications from XMediusFAX to users can be the same mail server, as described in the following schema:



**Note:** This example assumes that the receiving port number is 25 for both the XMediusFAX SMTP Gateway and the mail server, which is usually the default port number for receiving emails.

## Microsoft Exchange Integration

The Microsoft Exchange integration consists in allowing Exchange to support the sending of faxes and the relaying of fax notifications.

First, it enables the support of:

- The FAX address space, that permits the use of Outlook fax contacts (to know how to enable this, see [Allowing Sending of Faxes with a FAX Address Space](#) on page 37).
- The XMediusFAX Forms for Outlook, that allow users to send faxes and receive notifications through custom forms especially designed for fax (To know how to publish these forms, see [Microsoft Outlook Forms](#) on page 41).

Also, some configuration should be done on your Exchange server in order to enable the relaying of mail notifications sent by the SMTP Gateway of XMediusFAX (see [Allowing Reception of Mail Notification Messages](#) on page 40).

## Allowing Sending of Faxes with a FAX Address Space

**Note:** Depending on your license, the XMediusFAX feature using a FAX address space to send faxes from Outlook may be disabled. Please verify the terms of your license before performing the following configuration.

To enable your Exchange Server to support the sending of faxes with a FAX address space, you just need to create a new Exchange Connector having an address space of type FAX.

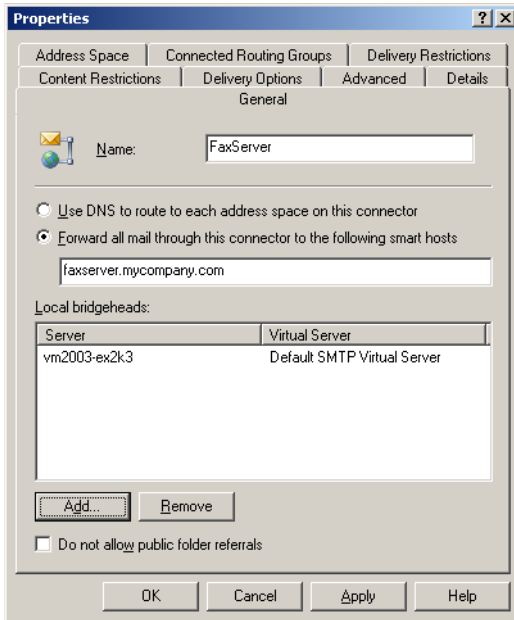
The procedure depends on your version of Exchange.

### ***Procedure for Microsoft Exchange 2000/2003***

---


This procedure shows how to create an SMTP Connector with address space of type FAX – when you are using MS Exchange 2000 or 2003 – to forward all faxes to the XMediusFAX SMTP gateway.

1. From the Exchange System Manager, right-click the **Connectors** node and select **New ► SMTP Connector**.



2. Select the **General** tab:

- a) Give the connector a **Name**: for example, `FaxServer`.
- b) Select the **Forward all mail through this connector to the following smart hosts** option.
- c) Enter the IP address or hostname of where the XMediusFAX SMTP gateway is running in the field below the previously selected option.

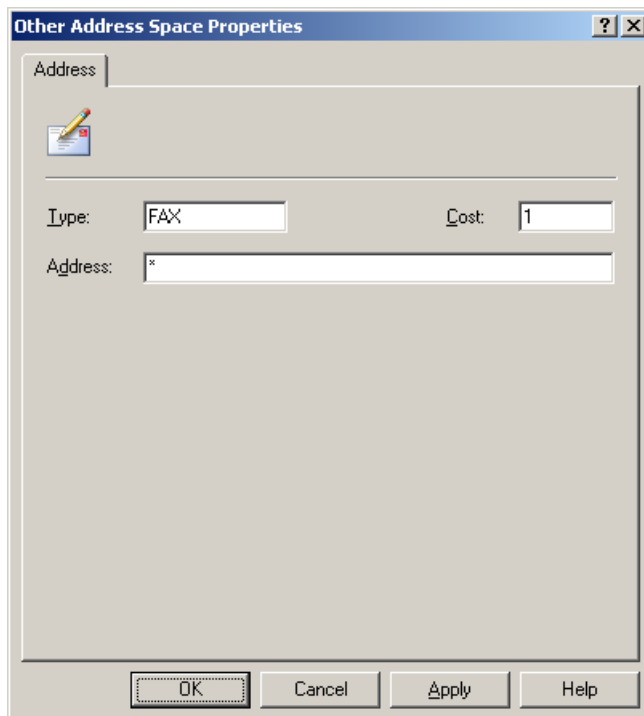
 **Note:** If you use an IP address be sure to surround it with square brackets, i.e. `[192.168.0.1]`.

- d) Add a bridgehead server by clicking **Add** and making a selection in the available list.

3. Create the address space:

- a) Select the **Address Space** tab, click **Add**, and then select **Other**. The **Other Address Space Properties** dialog appears.



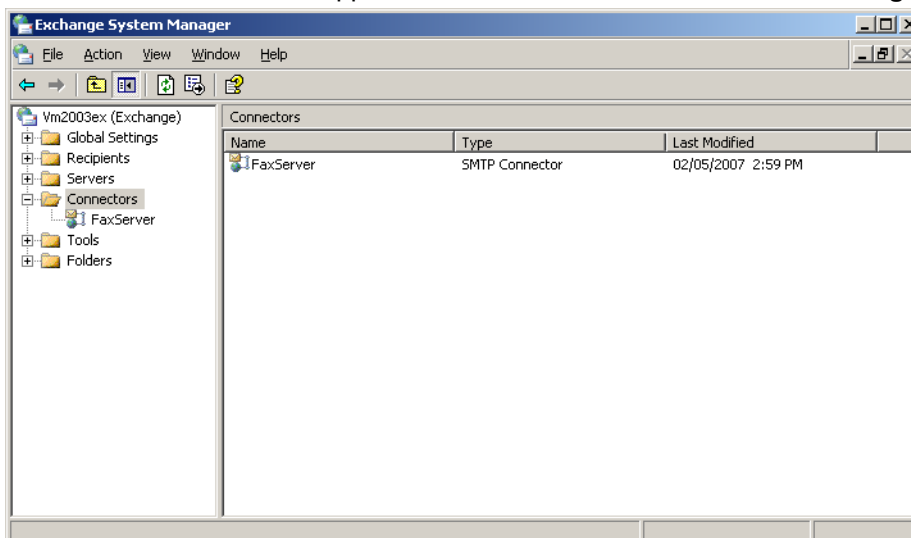


b) Complete the following fields:

- **Type:** FAX
- **Cost:** 1
- **Address:** \*

c) Click **OK** twice, to validate and close the properties window.

The new SMTP connector appears in the **Connectors** node of the **Exchange System Manager**.



### ***Procedure for Microsoft Exchange 2007 (and Higher Versions)***

This procedure shows how to create a Send Connector with address space of type FAX – when you are using MS Exchange 2007 (and higher versions) – to forward all faxes to the XMediusFAX SMTP gateway.

1. Open the Exchange Management Shell.
2. From the command prompt, execute the following command:

```
New-SendConnector -Name <ConnectorName> -AddressSpace
"fax:*;1" -SmartHosts "<SMTPGateway>" -DNSRoutingEnabled
$false -SourceTransportServers "<HubTransportServers>"
```

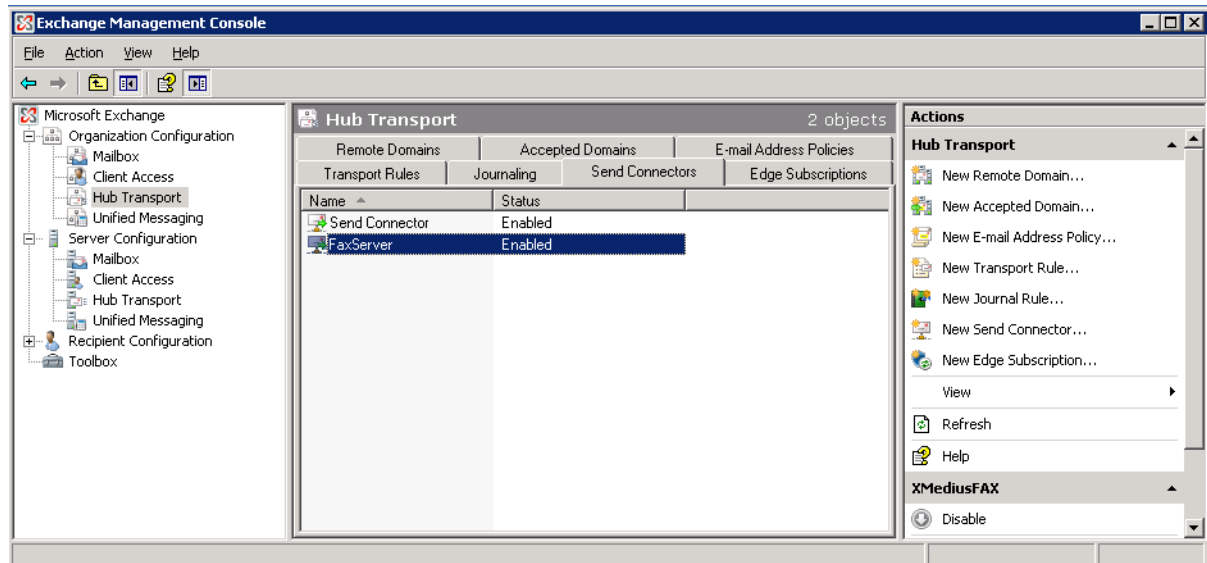
- <ConnectorName> must be replaced by the name you wish to give to the connector.
- <SMTPGateway> must be replaced with the hostname or IP address of the host where the XMediusFAX SMTP Gateway is running.
- <HubTransportServers> must be replaced with the names of the Hub Transport servers that can use this Send connector.

For example:

```
New-SendConnector -Name FaxServer -AddressSpace "fax:*;1" -SmartHosts
"faxserver.mycompany.com" -DNSRoutingEnabled $false -SourceTransportServers
"server01"
```

 **Note:** For more information about the New-SendConnector command, refer to the following Web link: [http://technet.microsoft.com/en-us/library/aa998936\(EXCHG.80\).aspx](http://technet.microsoft.com/en-us/library/aa998936(EXCHG.80).aspx)

From the **Exchange Management Console**, the SEND connector will appear in the organization's **Hub Transport** list.



## Allowing Reception of Mail Notification Messages


Integrating Microsoft Exchange as mail relay server means that all SMTP messages (mail notifications) coming from the XMediusFAX SMTP Gateway must be accepted by Exchange in order to relay them to internal or external mailboxes (depending on the Fax Server configuration).

If you configured your Exchange server with high security for incoming SMTP messages, it could block all mail notifications coming from the XMediusFAX SMTP Gateway. In that case, you should adjust the Exchange security parameters at this level:

- For Microsoft Exchange 2000 and 2003, you will find these parameters in the properties of the **SMTP Virtual Server** located in the **SMTP Protocols** node.
- For Microsoft Exchange 2007 and higher, you will find these parameters in the properties of the **Receive Connector**, located in the **Hub Transport** node.

## Microsoft Outlook Forms


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 **Note:** Depending on your license, the XMediusFAX feature used to process the forms for Outlook may be disabled. Please verify the terms of your license before installing the Outlook Forms.

XMediusFAX offers several forms for Microsoft Outlook: they allow users to send faxes and receive fax notifications and are especially designed for fax.

The following forms are available:

- Notification Incoming Success
- Notification Incoming Failed
- Notification Outgoing Success
- Notification Outgoing Failed
- Composition
- Preview
- Notification Broadcast


 **Note:** All these forms can be published either all together or independently.

## Publishing the Forms

---

Before publishing the MS Outlook Forms:

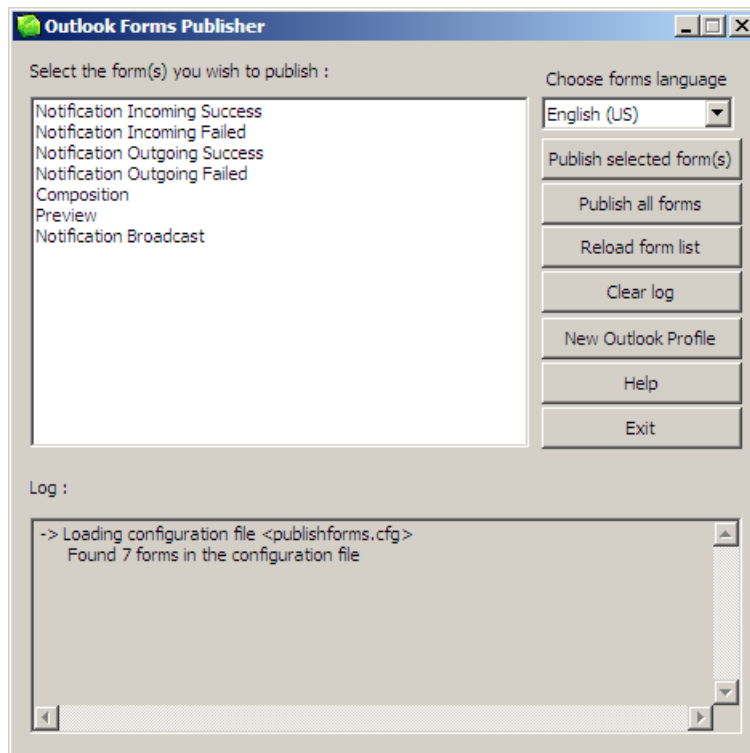
- XMediusFAX must be already installed.
- Microsoft Exchange (2000 or later) must be already installed.
- You must have previously performed the Microsoft Exchange Integration (see [Microsoft Exchange Integration](#) on page 37).
- Microsoft Outlook (2000 or later):
  - must be already installed (on a different machine than Exchange)
  - must not be set to **Cached Exchange** or **Work Offline** mode
- Still on Outlook, the account used to publish the forms must have at least the reading and writing rights on the public folders base of Exchange, and an Editor role (at least) on the `Organizational Forms Library` folder, if it already exists.

 **Note:** For the users, the only needed right for using the published forms is a reading right on this folder.

Also, to make the forms available for all Outlook users, you only need to publish them once.

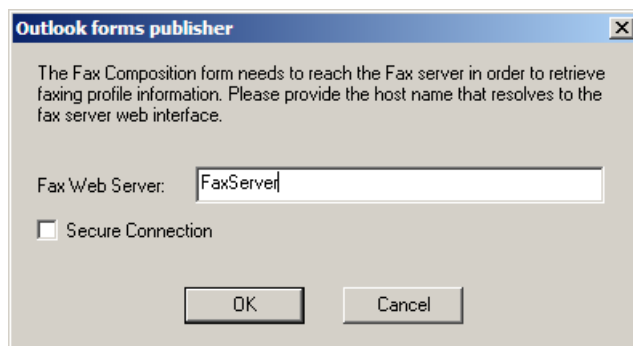
To publish the Outlook Forms:

1. In the `OutlookForms` directory of the XMediusFAX distribution media, double-click `publishforms.exe`.
2. A window appears displaying information about the forms.




Choose one of the following options:

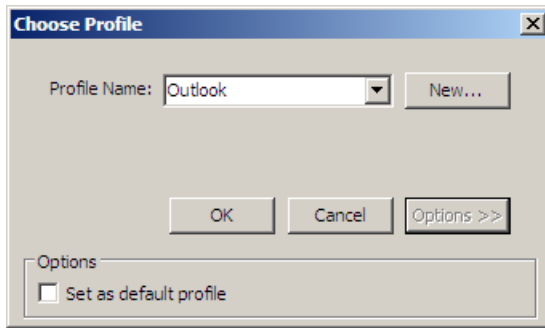
- To publish all the forms, click **Publish all forms**
- To publish only selected forms, select one or more forms and then click **Publish selected form(s)**.
- To refresh the list of forms, click **Reload form list**.
- To clear the log that appears in the lower half of the window, click **Clear log**.




3. In the **Fax Web Server** field, enter the name at which your Fax Server responds to http requests (the Common Name of your Fax Server, which is often the Host Name)

 **Note:** If you are planning to use HTTPS (secured HTTP with SSL) for client requests to the server, check the **Secure Connection** box. For more information on all other required HTTPS configurations (server and client side), see [Secured HTTP \(HTTPS\) Configurations](#) on page 33.

4. Click **OK**.



5. Select the Outlook profile to be used to publish forms.

 **Note:** The selected account should have sufficient privileges assigned.

6. Click **OK**.

As each form is published, you may be prompted to enable or disable the macros.

7. Click **Disable** Macros, each time.

The Outlook forms are published as selected.

8. When finished, click on **Exit**.

## Known Issues and Solutions

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### Incompatibility

An incompatibility between Microsoft Windows Terminal Server (any version) and Microsoft Outlook (2007, 2003, 2000 or XP versions), prevents scripts of any kind from working properly, thus affecting the forms for Microsoft Outlook.

A workaround exists, as posted by Microsoft at this location:

<http://support.microsoft.com/default.aspx?scid=kb;en-us;Q302003>.

The workaround instructs you to:


1. Copy the `Outlvbs.dll` file from a computer running Microsoft Windows 2003 that is not a Terminal Server.
2. Paste the `Outlvbs.dll` file in the `Microsoft Office` folder (e.g. **Program Files > Microsoft Office > Office11** for Office 2003) of the affected Terminal Server computer.

### PDF Viewing

If you are going to view notifications in PDF format, be aware that there is an incompatibility issue between Adobe Acrobat Reader 7 and versions of Microsoft Outlook older than *2003* and *XP Service Pack 3*. It is recommended that you use compatible versions of these software to prevent them to crash unexpectedly.

## Lotus Notes Form


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 **Note:** Depending on your license, the XMediusFAX feature used to process the form for Lotus Notes may be disabled. Please verify the terms of your license before starting this installation.

The Lotus Notes fax composition form provides a mean to send faxes (and possibly adjust faxing options) using the Lotus Notes mail client.

## Lotus Notes Form Installation

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-  **Important:** The administrator installing the forms must have the proper authorizations to install new databases, access the Lotus Notes client Administrator and modify access-control lists. The administrator must also be authorized to modify configuration documents on the server.


### Installation Planning

Installing the Lotus Notes Form requires the administrator to perform several operations – using both Lotus Domino and Lotus Notes with an administrative account – on the server hosting the Lotus Domino application.

Here are the main installation steps (you will further find all detailed steps for each):

1. [Signing the Database](#) on page 44
2. [Installing and configuring the Fax Memo Template](#) on page 45
3. [Synchronizing the Mail Template Databases](#) on page 48
4. [Redirecting the Fax Domain to the SMTP Gateway](#) on page 48
5. [Configuring the Lotus Notes Form](#) on page 49

After this, all targeted Lotus Notes users will be able to use the installed form.

-  **Note:** The procedures of this section are applicable as they are to Lotus Notes/Domino 8.0 or higher. They are also applicable to earlier versions of Notes/Domino, however some menus and paths may be slightly different. Mainly:


Notes/Domino 8.0 and higher versions	Earlier versions of Notes/Domino
File ► Open ► Lotus Notes Application	File ► Database ► Open
File ► Application ► Properties	File ► Database ► Properties

### Signing the Database

---

The database must first be signed by an administrator, to vouch for its integrity:

1. Put the database files on the Lotus Domino server:
  - a) In Microsoft Windows Explorer, browse to the `Lotus\Domino\Data` directory, on the server's hard drive.
  - b) Create a sub-directory called **Fax**.
  - c) Copy the `Fax_Memo_Install.nsf` and `FAXconfiguration.nsf` database files, from the `NotesForms` folder in the XMediusFAX distribution media to the **Fax** sub-directory you just created.

 **Note:** `.nsf` stands for **Notes Storage Facility**. These files represent typical Lotus Notes databases.

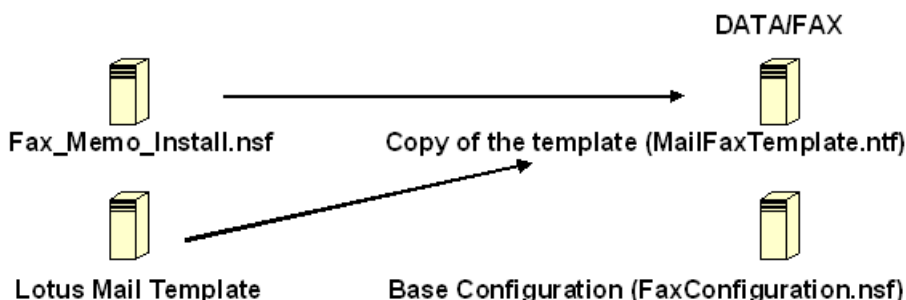
2. Find the database files in the Domino Administrator:
  - a) Start the Domino Administrator by clicking **Start ► Programs ► Lotus Applications ► Lotus Domino Administrator**.
  - b) Once logged in, click on the tab for the server (domain), on which the database that you want to sign is located.
  - c) Click on the **Files** tab.
  - d) In the panel at the left, double-click on the **Fax** folder.
3. Sign the database files:

- a) In the panel at the center of the window, select both databases (Fax Memo Install and Fax Configuration), right-click and select **Sign**.
- b) Choose either of the following, as per your organization's policy:
  - **Active User's ID** to sign using your ID.
  - **Active Server's ID** to sign using the ID of the server that stores the database or template.
- c) Click **OK**.
- d) In the **Create Cross Certificate** dialog that appears, click **Yes**.  
A dialog box may appear, showing the number of databases processed and the number of errors that occurred (if any). See the **Notes Log** for details.

### ***Installing and configuring the Fax Memo Template***

The goal is to modify the organization's mail template as little as possible. This installation basically does the following:

- copies the current mail template into the **Fax** sub-directory (`MailFaxTemplate.ntf`). The copy becomes the new template and is used to refresh the mail databases,
- integrates the fax form design elements into the copy of the mail template,
- configures the database.




To launch the automatic-install process, follow these steps:

1. Start Lotus Notes by clicking **Start > Programs > Lotus Applications > Lotus Notes**.
2. Install the Fax Memo Template:
  - a) Select the tab for an empty workspace and click **File > Open > Lotus Notes Application**.
  - b) In the **Open Database** dialog, select the server where the `Fax_Memo_Install.nsf` and `FAXconfiguration.nsf` database files are located, in the **Server** box.
  - c) Double-click on the **Fax** folder and then double-click on **Fax Memo Install**.
  - d) Click **Open**. The **Installation Form** tab is created in the Lotus Notes workspace.
  - e) Fill in the fields as follows:

Field	Description	Default Value
<b>Installation Path</b>	The location on the server where Lotus Domino is installed.	<code>&lt;DominoInstallPath&gt;\Data</code>
<b>Mail Template Path</b>	The path where the organization mail template is located.	<code>&lt;DominoInstallPath&gt;\Data</code>
<b>Mail Template Name</b>	The name of the organization's current mail template file.	<code>mail&lt;DominoVersion&gt;.ntf</code>
<b>Server Name</b>	The identification of the server where Lotus Domino is installed.	<code>CN=&lt;DominoHostName&gt;/O=&lt;CompanyDomain&gt;</code>

- f) Click the **Begin Installation** button: a progress bar will appear. The installation database (Fax\_Memo\_Install.nsf) contains all the design elements necessary for installing the fax forms. The (FAXconfiguration.nsf) is used to define the various languages.
  - g) Once the installation procedure is complete, click the **Exit Installation** button that appears.
3. Click **No** when you are prompted to open the configuration database to set up your specific language needs (this will be done at a later time).


 **Note:** From here, if you wish to apply the forms to all users of your company, you can continue the current procedure as it is given. Otherwise, it is possible to apply these forms only to some users; in that case, you can adapt the rest of the procedure by changing the settings only for these users.

4. Access the Lotus Notes server database:

- a) Click **File > Open > Lotus Notes Application**.
- b) In the **Open Database** dialog, select the **Lotus Notes** server, in the **Server** box.


5. Access the organization's inbox tab:

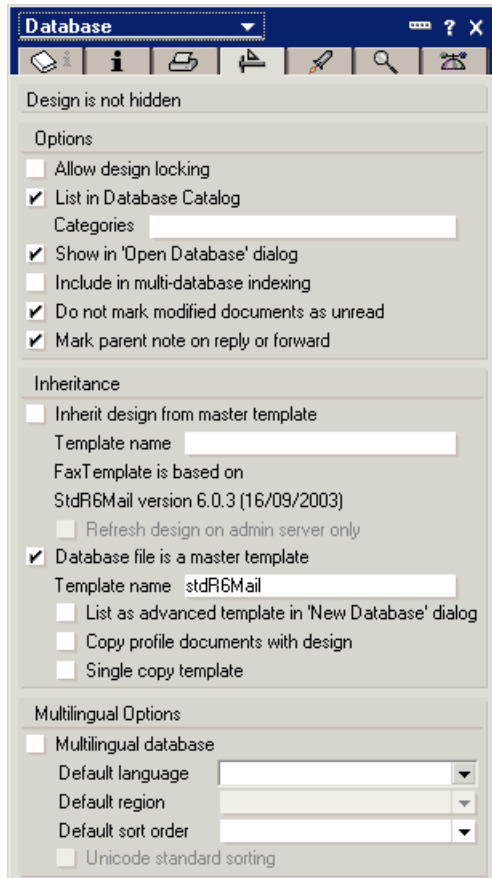
- a) In the **Filename** field at the bottom, type the name of the organization's current mail template file (mailx.ntf, where x is the Domino/Notes version, i.e. mail8.ntf for version 8 or mail85.ntf for version 8.5).

 **Note:** .ntf stands for Notes Template Facility. Such a file represents a Lotus Notes template, a skeleton that contains database design elements, but no documents.

- b) Click **Open**. A new tab appears showing the organization's **Inbox**.


6. Change the organization's inbox properties:

- a) Click **File > Application > Properties**.
- b) In the dialog, click on the fourth tab ().





- c) Highlight the value in the **Template name** field, right-click and select **Copy**.

 **Remember:** You need to keep this value copied for a further step.

- d) Uncheck the **Database file is a master template** box.  
e) Close the dialog.


7. Access the Lotus Notes server database again:

- a) Click **File ► Open ► Lotus Notes Application**.  
b) In the **Open Database** dialog, select the **Lotus Notes** server, in the **Server** box.


8. Access the Mail-Fax template tab:

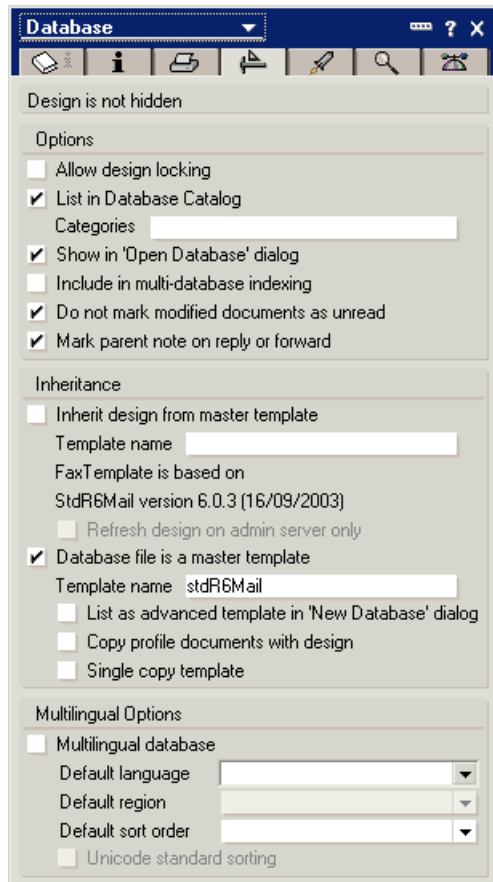
- a) Double-click on the **Fax** folder.  
b) In the **Filename** field at the bottom, type `Fax\MailFaxTemplate.ntf`.  
c) Click **Open**.

The **Mail-Fax Template-Fax** tab opens and a **Fax** option is now visible in the **Views** folder in the left pane. A **Mail-Fax Template** icon is also created in the workspace.

 **Note:** Views display specific documents with similar criteria in a database.

9. Adjust the Mail-Fax template properties:

- a) Click **File ► Application ► Properties**.  
b) In the dialog, click on the fourth tab ().



- c) Check the **Database file is a master template** box.  
d) Right-click and select **Paste**, in the **Template name** field. The name of the organization's current mail template should now appear.  
e) Close the dialog.

### ***Synchronizing the Mail Template Databases***

---

The Designer server task synchronizes all server and user databases that are linked to a template. For the update to work, a template must reside on the same server as the databases linked to it. Replicas synchronize with the templates stored on their servers.

By default, the Designer server task runs at 1:00 a.m. However, an administrator can synchronize the mail template database manually.

To do so:

1. Start the Domino Administrator by clicking **Start ► Programs ► Lotus Applications ► Lotus Domino Administrator**.
2. Once logged in, click on the tab for the server (domain), on which the database that you want to synchronize is located.
3. Click on the **Server**, and then the **Status** tabs.
4. Click **Server Console** in the panel at the left.
5. Type `Load design -d mail` in the **Domino Command** box at the bottom of the console, and then press **Enter**.


### ***Redirecting the Fax Domain to the SMTP Gateway***

---

1. Start the Domino Administrator by clicking **Start ► Programs ► Lotus Applications ► Lotus Domino Administrator**.
2. Click on the tab for the server (domain).
3. Click the **Configuration** tab.
4. Expand the **Messaging** item in the left-hand panel and click on **Domains**.
5. Click **Add Domain**.

Domain fax.com	
<a href="#">Basics</a>   <a href="#">Restrictions</a>   <a href="#">Routing</a>   <a href="#">Comments</a>   <a href="#">Administration</a>	
<b>Messages Addressed to:</b> Internet Domain: <input type="text" value="fax.com"/>	<b>Should be Routed to:</b> Domain name: <input type="text" value="fax.com"/> or, Internet host: <input type="text" value="10.60.1.61"/>

6. Under the **Basics** tab, select **Foreign SMTP Domain** in the **Domain type** field.
7. Under the **Routing** tab, type `Fax.com` in the **Internet Domain** field.

 **Note:** `Fax.com` is the domain name used by default in the Notes Form. If you enter here another name for the fax domain, you will also need to adjust it during the Form configuration (later).


8. Enter the host name or IP address of the computer hosting the XMediusFAX SMTP gateway, in the **Internet host** field.
9. Click **Save & Close**.  
A new entry called **Fax.com** should be visible in the central panel of the Administrator.
10. Close the Lotus Domino Administrator.

## Configuring the Lotus Notes Form

1. Start Lotus Notes by clicking **Start > Programs > Lotus Applications > Lotus Notes**.
2. Create and open the Fax Configuration tab:
  - a) Select the tab for an empty workspace and click **File > Open > Lotus Notes Application**.
  - b) In the **Open Database** dialog that appears, select the server where the `FAXconfiguration.nsf` database file is located, in the **Server** box.
  - c) Double-click on the **Fax** folder and then double-click on **Fax Configuration**.
  - d) Click **Open**.

The **Fax Configuration** tab is created in the Lotus Notes workspace.

Language	Fax Domain	Profile Web Address
FR	@Fax.com	http://ServerName/fax/Profile.jsp?ProfileVersion=3
FR-CA	@Fax.com	http://ServerName/fax/Profile.jsp?ProfileVersion=3
EN	@Fax.com	http://ServerName/fax/Profile.jsp?ProfileVersion=3
IT	@Fax.com	http://ServerName/fax/Profile.jsp?ProfileVersion=3
ES	@Fax.com	http://ServerName/fax/Profile.jsp?ProfileVersion=3
DE	@Fax.com	http://ServerName/fax/Profile.jsp?ProfileVersion=3
PT	@Fax.com	http://ServerName/fax/Profile.jsp?ProfileVersion=3

3. Adjust the Form settings for connection to the Fax Server:
  - a) Select the language for which you want to make the modification.
  - b) Double-click the value in the **Profile Web Address** column and edit the address according to your Fax Server deployment:  
 Acceptable syntax: `{http|https}://<ServerName>/fax/Profile.jsp?ProfileVersion=3`  
 where `<ServerName>` is the Host Name or IP address of the Fax Server host.  
 **Note:** In HTTPS context, `<ServerName>` must be the Common Name of the Fax Server (and not its IP address).
  - c) If the domain you previously configured via the Lotus Domino Administrator is different from “Fax.com” (default), adjust the value in the **Fax Domain** column.
  - d) Repeat all these steps for all the languages being used.
4. Click **Save & Close**.
5. Close the Lotus Notes Application

## Changing the Fax Domain

If you need to change the name of the fax domain (`Fax.com` by default):

1. Change the fax domain name on the Domino server:
  - a) Start the Domino Administrator and access the **Domains** configuration screen.
  - b) Select the existing fax domain (`Fax.com` by default).
  - c) Under the **Routing** tab, type the new domain name in the **Internet Domain** field.

Domain fax.com

Basics | Restrictions | Routing | Comments | Administration

Messages Addressed to:

Internet Domain: fax.com

Should be Routed to:

Domain name: 10.60.1.61

or,

Internet host: 10.60.1.61

d) Click **Save & Close**, then close the Lotus Domino Administrator.

2. Change the fax domain name in the Notes Form configuration:

a) Start the Lotus Notes Application and access the **Fax Configuration** tab.

Fax Server System Configuration

» System Configuration Edit

Language	Fax Domain	Profile Web Address
FR	@Fax.com	http://ServerName/fax/Profile.jsp?ProfileVersion=3
FR-CA	@Fax.com	http://ServerName/fax/Profile.jsp?ProfileVersion=3
EN	@Fax.com	http://ServerName/fax/Profile.jsp?ProfileVersion=3
IT	@Fax.com	http://ServerName/fax/Profile.jsp?ProfileVersion=3
ES	@Fax.com	http://ServerName/fax/Profile.jsp?ProfileVersion=3
DE	@Fax.com	http://ServerName/fax/Profile.jsp?ProfileVersion=3
PT	@Fax.com	http://ServerName/fax/Profile.jsp?ProfileVersion=3

b) Select the language for which you want to make the modification.

c) Adjust the value in the **Fax Domain** column according to the new fax domain name.

d) Repeat the previous steps for all the languages being used.

e) Click **Save & Close**, then close the Lotus Notes Application.

## Using TLS for SMTP with XMediusFAX

If you wish to increase security on SMTP messages (emails) managed by XMediusFAX, the best solution is to insert a mail server in front of the XMediusFAX SMTP Gateway and configure this email server in order to support TLS. Then, your TCP connections will be encrypted (if external servers support TLS too).

 **Note:** For more information about using a mail server with XMediusFAX and about all additional benefits this can provide, see [The XMediusFAX SMTP Gateway](#) on page 35.

Though, if your local deployment does not include any mail server, you can easily install a small mail relaying software that support TLS on another computer of your local network (or even on the same computer as the Fax Server). Among easily available mail relay servers, IIS (Internet Information Services) on Windows and Sendmail on other platforms provide easy to configure solutions.


The IIS on Windows offers the benefit of being used and configured directly on the computer hosting XMediusFAX. If this solution may be more convenient, as it does not require the use of another computer, it is however a bit more complex to configure. Therefore, you will find two procedures as examples in this documentation:

1. The first one will describe a typical IIS configuration enabling the support of TLS on SMTP messages used for notifications (SMTP Gateway output): see [Configuring IIS for SMTP TLS in Output](#) on page 51.
2. The second one will describe a typical IIS configuration enabling the support of TLS on SMTP messages used for sending faxes (SMTP Gateway input), in addition to the previous case: see [Configuring IIS for SMTP TLS in Input](#) on page 56.

## Configuring IIS for SMTP TLS in Output

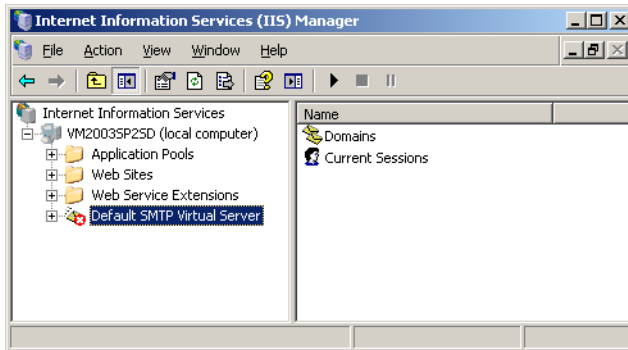
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To enable the support of TLS on SMTP messages used for notifications (SMTP Gateway output) on the computer hosting XMediusFAX:

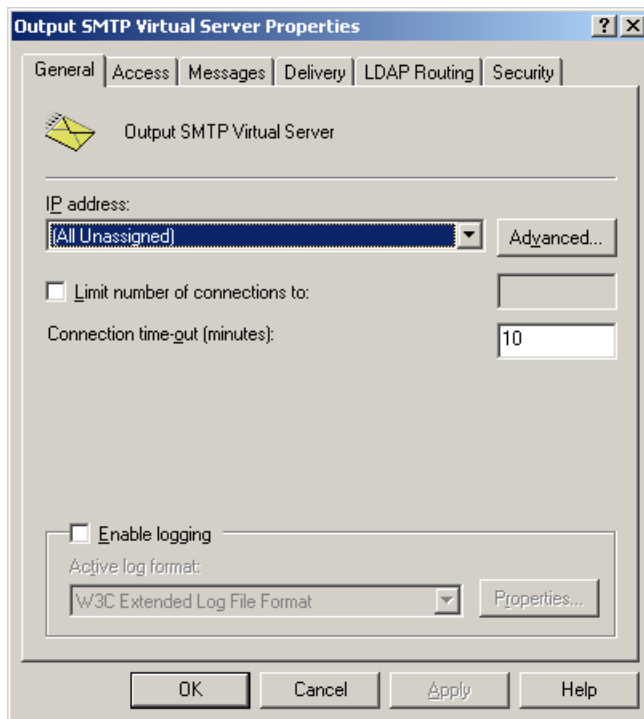
1. Verify if the SMTP Service of IIS is installed and enabled on the computer hosting XMediusFAX:
    - a) Verify its presence in the Windows Services: **Simple Mail Transfer Protocol (SMTP)**
    - b) If the service is not present, install the following Windows component:
      - Before Windows 2008: **Application Server > Internet Information Services (IIS) > SMTP Service**
      - From Windows 2008: **Turn Windows features on or off > Features > Add Features > SMTP Server**
    - c) In the Windows Services, access the properties of the SMTP service and set its **Startup Type** to *Automatic* (if it is not already).
-  **Note:** Do not start the service now: it must be first configured. If it was already started, you should stop it now.

2. Configure IIS as TLS output Gateway:

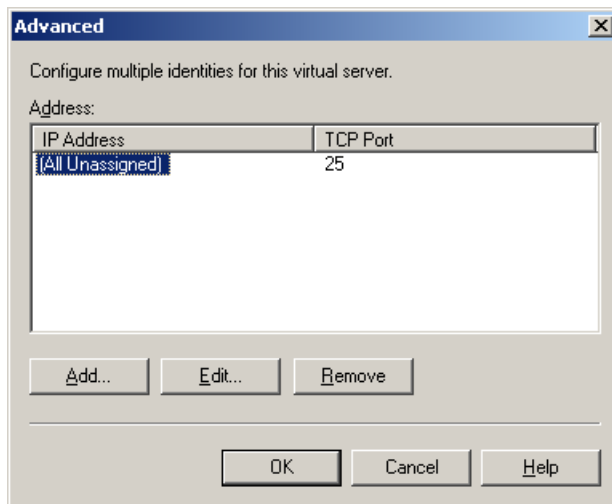
- a) Access the **Internet Information Services (IIS) Manager**.



- b) In the left frame of the Manager, expand the host node, right-click the **Default SMTP Virtual Server** node and select **Rename**.
- c) Give the node an appropriate name, for example: "Output SMTP Virtual Server".
- d) Right-click again the renamed node and select **Properties**.



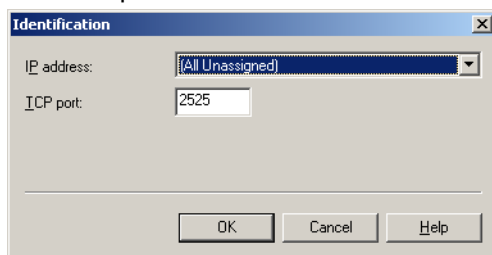
e) In the **General** tab, click **Advanced**.



f) Click **Edit**.

g) Change the value of the **TCP port** for a port value that is not already used.

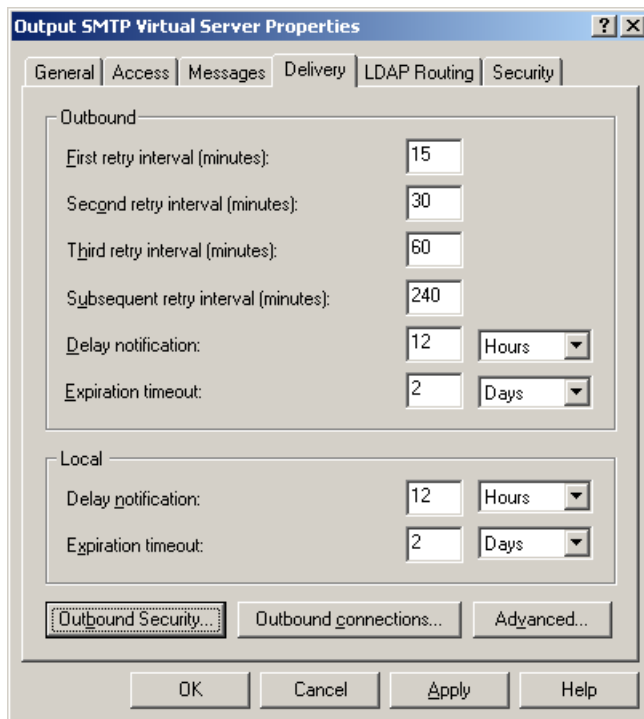
For example: 2525.



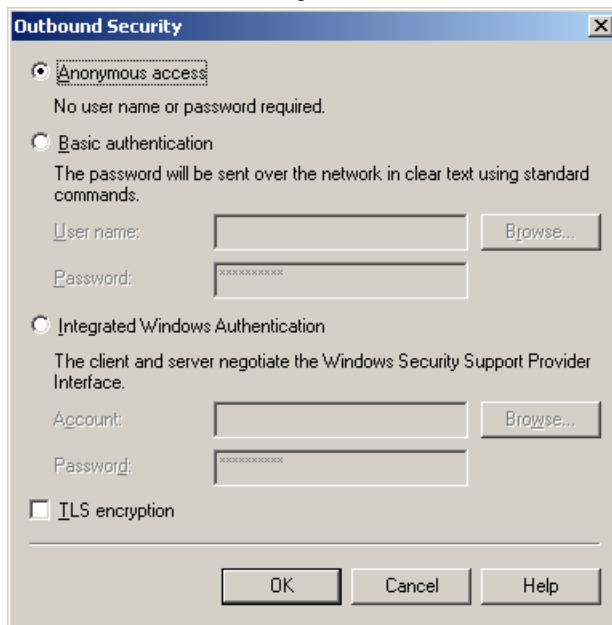
h) Validate twice with **OK**.

3. Enable TLS encryption in output:


a) Still in the Properties dialog, select the **Delivery** tab.



b) Click **Outbound Security**.



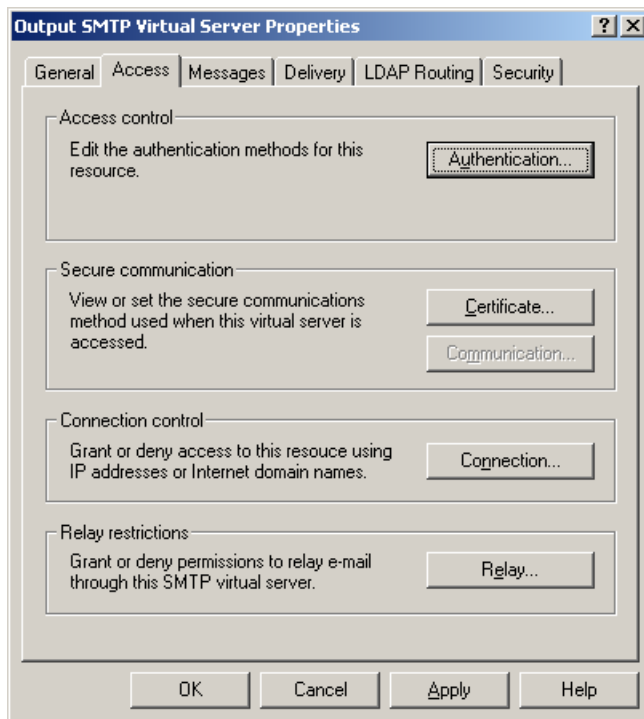
c) Check the **TLS encryption** box.

 **Note:** If needed, you can also select one of the three authentication options and enter credentials, depending on your requirements.

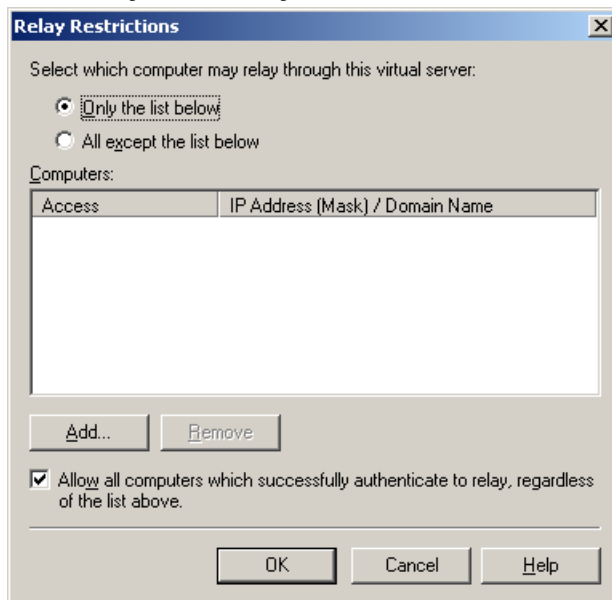
d) Click **OK**.

#### 4. Limit the relay to the only local machine

a) Still in the Properties dialog, select the **Access** tab.

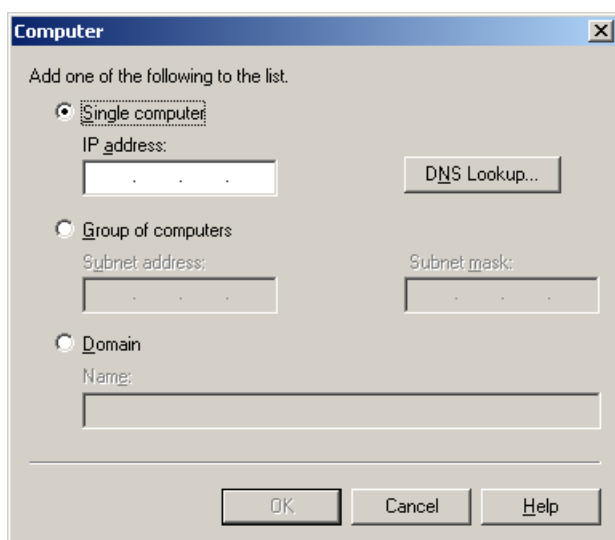



b) Click **Relay** in the **Relay restrictions** section.

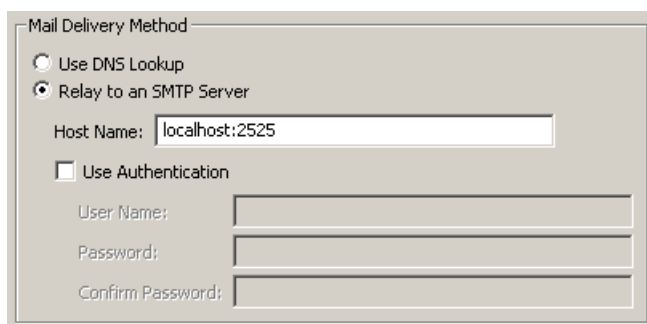



c) Select the **Only the list below** option and click **Add**.





- d) Select the **Single Computer** option.
  - e) Use the **DNS Lookup** button and enter `localhost` in the appearing dialog, then validate.  
The corresponding IP address appears now in the **IP address** field.
  - f) Click **OK** three times to validate and close the **Properties** dialog.
5. Start the service using the  button.  
The red mark should disappear from the node.
  6. Configure XMediusFAX for relaying SMTP to IIS:
    - a) In the XMediusFAX administration interface, access the **System Configuration** ► **[Host]** ► **SMTP Gateway** properties.
    - b) In the **Mail Delivery Method** section of the **Gateway Settings** tab, select the **Relay to an SMTP Server** option.
    - c) In the **Host Name** field, enter the host name and port number corresponding to the IIS SMTP input:  
According to the example used, the value should be: `localhost:2525`.



 **Note:** Authentication is no more needed here, as IIS and the Fax Server are on the same machine.

- d) Click **OK** to validate.

IIS and XMediusFAX are now configured for using TLS on SMTP in output.

If you wish to test this configuration, see [Testing the SMTP TLS Output Configuration](#) on page 56.

If you wish to configure IIS for SMTP TLS in Input, in addition to the configuration you just made, see [Configuring IIS for SMTP TLS in Input](#) on page 56.

## Testing the SMTP TLS Output Configuration

---

To perform this test, you must have configured your system according to the procedure described in [Configuring IIS for SMTP TLS in Output](#) on page 51. It is assumed the SMTP Gateway of your Fax Server was already working correctly in output before this configuration.

The purpose of this test is to make the Fax Server generate a mail notification in order to see if it is well relayed by the SMTP Virtual Server of IIS.

This can be done for example by sending a new fax from a user account whose profile is set to receive mail notifications (for more details about sending a fax, see the *XMediusFAX User Guide*).


If the user does not receive any mail notification for the fax sent, you can try to troubleshoot the problem by following these steps:

1. From the **System Monitor > Outbound History** node of the administration interface, open the **Properties** (accessed by right-click) of the fax that has been sent and select the **Feedback Sent To** tab. Here, the **Error Code** normally indicates 0, which means the test is successful. If not, continue to follow this procedure.

2. Access the two following folders of the current machine and check their content:

- C:\Inetpub\mailroot\Badmail
- C:\Inetpub\mailroot\Queue

If these folders contain files, continue this procedure.

 **Note:** It is normal that you see files in the `Queue` folder during the process. It becomes abnormal when a file stays in it permanently.

3. Access the Windows Event Viewer: **Start > Programs > Administrative Tools > Event Viewer**.
4. In the left frame, select **System**.
5. In the right frame, double-click messages whose **Source** is `SMTPSVC`.  
The message window that opens should inform you on the problem.

## Configuring IIS for SMTP TLS in Input

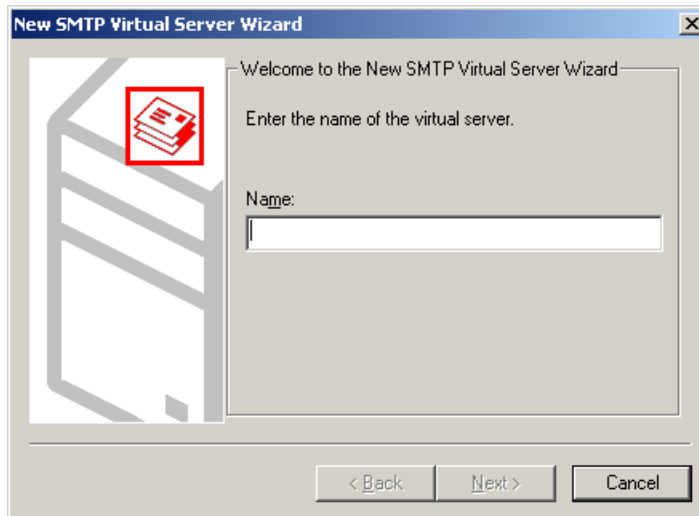
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This procedure assumes you have already configured IIS for SMTP TLS in output (see [Configuring IIS for SMTP TLS in Output](#) on page 51).

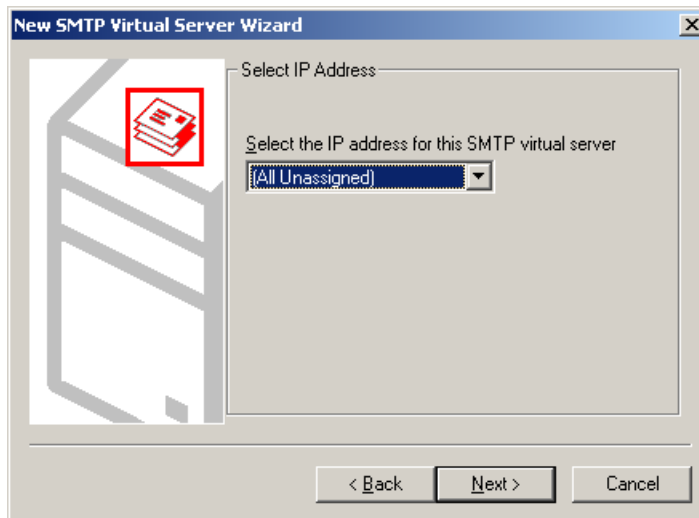
To enable the support of TLS on SMTP messages used for sending faxes (SMTP Gateway input) on the computer hosting XMediusFAX (through IIS):

1. On the current machine, create a new folder: `C:\Inetpub\inboundmail`.
2. Make the XMediusFAX SMTP Gateway listen on another port than 25, for example 2526:
  - a) Create the following new registry key:  
**HKEY\_LOCAL\_MACHINE\SOFTWARE\Interstar Technologies\XMedius\SMTP Gateway\Settings\Port**, of type **String**.
  - b) Give it the value `2526` (as per our example).
  - c) Restart the **XMSmtpGateway** service.
3. Create and configure a second instance of SMTP Virtual Server on IIS:
  - a) Access the **Internet Information Services (IIS) Manager**.

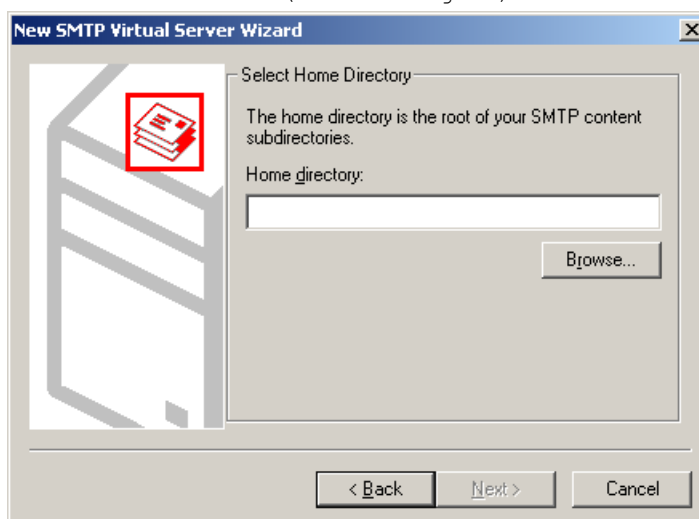
- b) In the left frame of the Manager, right-click the host node and select **New ► SMTP Virtual Server**.



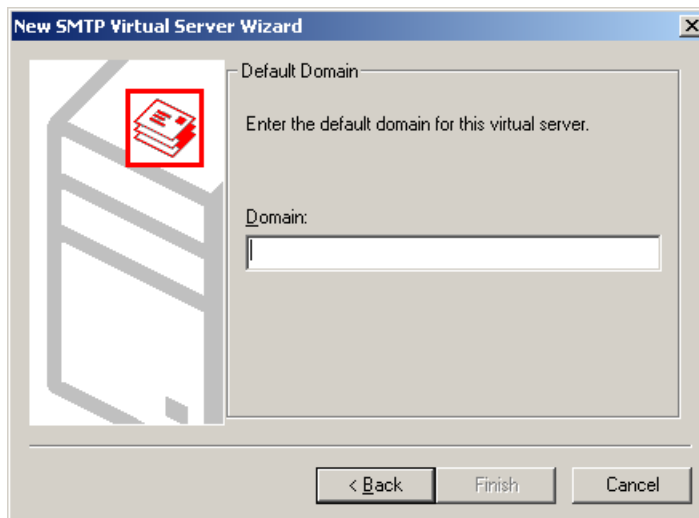
- c) Name the virtual server (for example, “Input SMTP Virtual Server”) and click **Next**.




- d) Leave the selection on (All Unassigned) and click **Next**.



- e) Browse for the folder created at the first step (in our example: C:\Inetpub\inboundmail), validate and click **Next**.



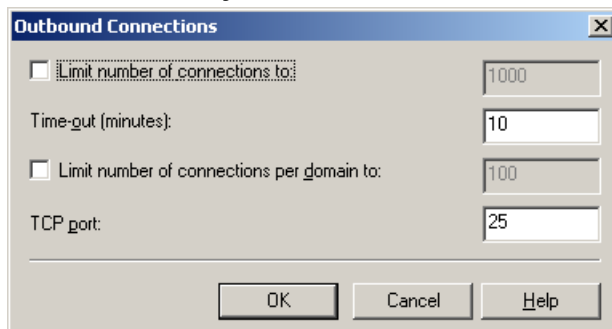
f) Enter the value `example.com` and click **Finish**.

 **Note:** This value is not an example, it must be precisely the indicated value, that corresponds to a non-existing domain – it is what we need here.

The new SMTP Virtual Server appears now in the IIS Manager.

4. Configure IIS to forward SMTP messages to XMediusFAX:

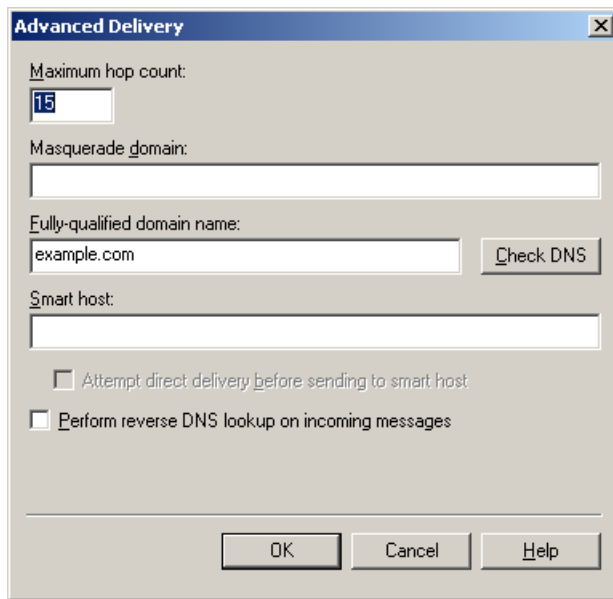
- a) Right-click the newly created node, select **Properties**.
- b) Select the **Delivery** tab and click **Outbound connections**.



c) Change the value of the **TCP port** for the value entered through the registry key for the SMTP Gateway input.

In our example, the value is 2526.

d) Validate with **OK** and click **Advanced**.



e) In the **Smart host** field, enter [127.0.0.1].

 **Note:** This is the local host IP address. Note that the square brackets are mandatory here.


f) Validate with **OK**.

5. Enable the relay through this Virtual Server for all SMTP messages coming from any computer:

- a) Select the **Access** tab and click **Relay**.
- b) Select the **All except the list below** option.
- c) Leave the list empty and validate with **OK**.

6. Enable TLS in input by using a certificate:

- a) Still in the **Access** tab, click **Certificate**.  
The **Web Server Certificate Wizard** appears, with which you will be able to select your TLS certificate.
- b) Follow the wizard depending on the way you managed to obtain your certificate.
- c) Once your certificate is selected, click **OK** to close the **Properties** dialog.

7. Start the service using the  button.

The red mark should disappear from the node.

IIS and XMediusFAX are now configured for supporting TLS on SMTP in input.

If you wish to test this configuration, you just need to send a test fax by using your usual mail client software (see the *XMediusFAX User Guide* for more details). If the fax is processed by the Fax Server, the test is successful.

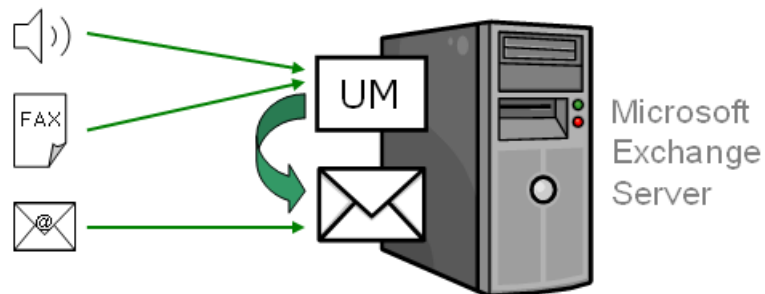


## Chapter 7 *Microsoft Exchange UM Integration*

### *Integrating XMediusFAX as Fax Solution for MS Exchange UM*

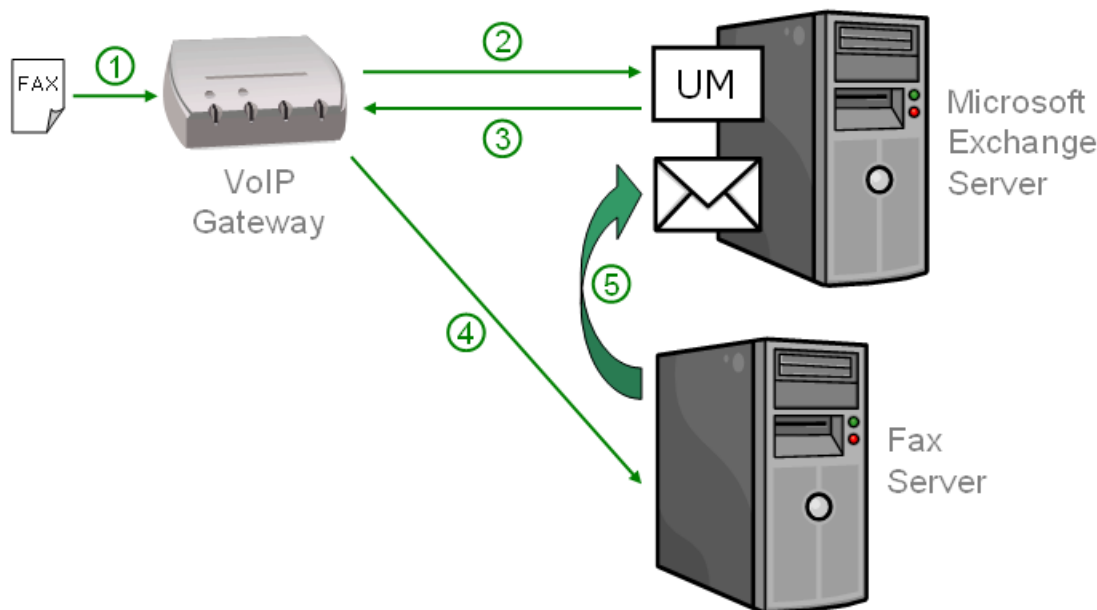
Unified Messaging (UM) is the integration of different electronic messaging media (email, SMS, fax, voicemail, video messaging, etc.) into a single interface. One aspect of UM is to regroup lots of information into one single point of access. Microsoft Exchange enables you to store all emails, faxes and voicemails in the same mailbox.

In Microsoft Exchange 2007, faxes and voicemails were both totally managed by the UM module and finally stored in the server mailbox (with the emails), as shown in the following picture:



Since version 2010 of Microsoft Exchange, the UM module manages differently the fax reception: it allows fax calls to be redirected to an external fax system – as XMediusFAX – that is able to receive the faxes and process them. XMediusFAX allows fax notifications to be finally sent to the Exchange Server mailbox, in the form that was used by the UM module in Exchange 2007 – or even in a custom form managed through XMediusFAX.

The following picture shows a typical deployment including a Microsoft Exchange 2010 Server and XMediusFAX and gives the way a fax is received and managed by the whole system:



Typically:

1. Your VoIP Gateway receives a call.
2. The call is redirected to the UM module of the Exchange Server.
3. The UM module detects a fax tone, tells the Gateway to redirect the call to XMediusFAX and transmits information indicating who will be the recipient of the fax.
4. The Gateway redirects the call to XMediusFAX and – after negotiation – XMediusFAX receives the fax.
5. XMediusFAX processes the fax according to its routing table and sends a fax notification to the Exchange Server mailbox according to the mail notification profile configuration of the fax recipient.

Such a deployment requires several configurations that are described in this chapter:

- Exchange UM module configurations (see [Configuring Exchange UM for Fax Reception and Redirection](#) on page 62)
- XMediusFAX configurations (see [Configuring XMediusFAX for Fax Reception With Exchange UM](#) on page 63)

## ***Configuring Exchange UM for Fax Reception and Redirection***

### **Configuring the Fax Tone Detection**

Depending on your deployment, you can choose to configure either your Exchange UM module or your VoIP Gateway (if it allows it) to analyze the CNG tone of incoming calls, in order to detect faxes.

**Note:** In both cases anyway, the UM module will transmit all the necessary information to the Gateway in order for the fax to be redirected to XMediusFAX and routed to the correct recipient.

For more information about this configuration, please refer to the documentation of Microsoft Exchange UM or of your VoIP gateway.

### **Enabling Exchange Users for Fax Reception**

To allow your Exchange Users to receive faxes in a UM context, they must first be set “UMEnabled”. Also, you must perform some configurations for each concerned user at the three following levels:

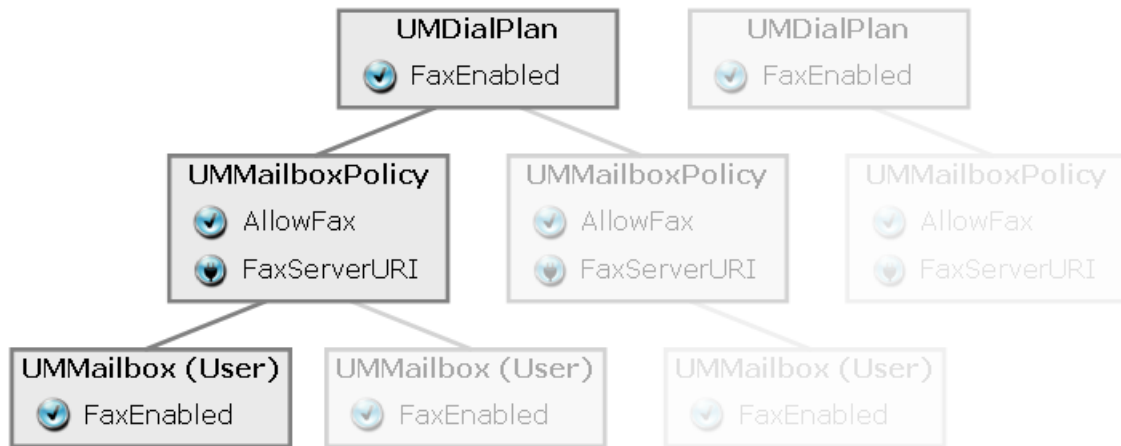


1. At the `UMMailbox` level, the `FaxEnabled` parameter must be set to `True`.
2. At the `UMMailboxPolicy` level:
  - the `AllowFax` parameter must be set to `True`, and
  - the `FaxServerURI` parameter must be set to indicate the IP address (or host name) and the port number of your Fax Server – for example:

```
-FaxServerURI "sip:fax.domain.com:5060;transport=TCP"
```

or

```
-FaxServerURI "sip:fax.domain.com:5061;transport=TLS"
```
3. At the `UMDialPlan` level, the `FaxEnabled` parameter must be set to `True`.



Each concerned user must be configured this way. Therefore, each `UMDialPlan` and each `UMMailboxPolicy` related to any concerned user (`UMMailbox`) must be configured the same way.

**Note:** These configurations apply only when integrating Microsoft Exchange UM since version 2010. For more information about the concept of Exchange UM Integration, see [Integrating XMediusFAX as Fax Solution for MS Exchange UM](#) on page 61.

For more information about configuring the UM module, please refer to the Microsoft Exchange UM documentation.

## ***Configuring XMediusFAX for Fax Reception With Exchange UM***

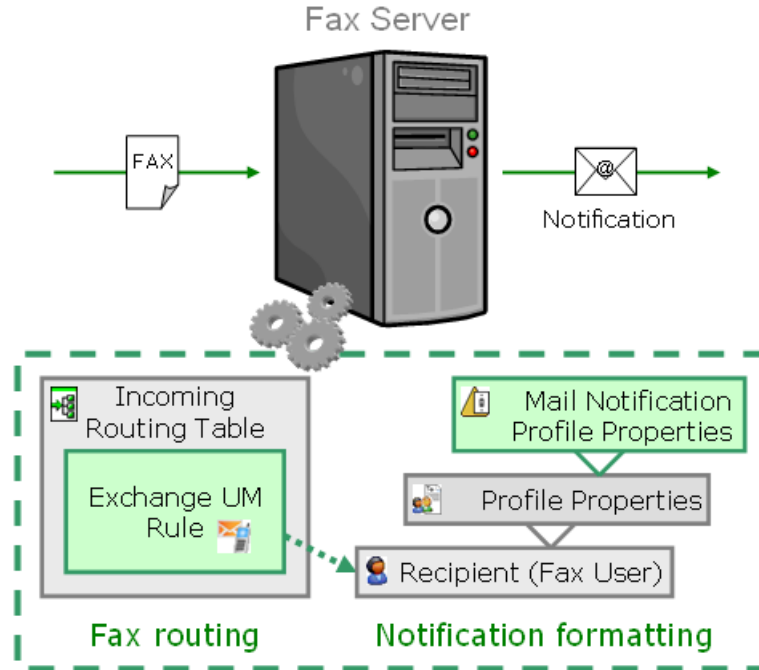
These configurations in the Fax Server side address the processing of faxes, between the fax reception by XMediusFAX and the notification sending to the Exchange mailbox.

**Note:** The following procedures assume that you are using the MS Exchange Server as mail relay server in front of the XMediusFAX SMTP Gateway (see [Using a Mail Relay Server for Receiving Notifications](#) on page 36).

Two XMediusFAX features are affected by these configurations:

- The Incoming Routing Table of the site(s), where a rule specific to the UM context can be added (see [Configuring the Incoming Routing Table of a Site for UM Routing](#) on page 64).
- The Mail Notification Profile Properties of the XMediusFAX users, where options can be selected to determine the formatting of fax notifications (see [Configuring the Mail Notification Profile for UM Integration](#) on page 65).

Here is a schema of the fax processing using the specific Exchange UM Integration features in XMediusFAX, once the fax has been redirected by the UM module:



**Note:** These configurations apply only when integrating Microsoft Exchange UM since version 2010. For more information about the concept of Exchange UM Integration, see [Integrating XMediusFAX as Fax Solution for MS Exchange UM](#) on page 61.

## Configuring the Incoming Routing Table of a Site for UM Routing

**Note:** This configuration applies only when integrating Microsoft Exchange UM since version 2010.

There is a specific rule type in the Site Incoming Routing Table, that allows faxes that have been redirected by the Microsoft Exchange UM module to be routed according to the recipient information given by the latter. With such a rule, XMediusFAX does not interfere with this information and lets the concerned faxes follow the route given by the UM module.

**Note:** If you do not use this rule in an Exchange UM Integration context, the recipient information transmitted with faxes by the UM module will be simply ignored by XMediusFAX.

To add an Exchange UM rule to the Incoming Routing Table of your site(s):

1. In the XMediusFAX administration interface, access the **Configuration ► Incoming Routing Table** node of your site.
2. Click the **Add Exchange UM Rule** button.
3. Click **OK** to validate.

The rule appears now in the Incoming Routing Table and will match exclusively faxes that have been redirected by the Exchange UM module.

**Note:** Most of the time in an Exchange UM Integration context, you will need to put the Exchange UM Rule at the top of the list to obtain the best results. However, it will depend on the way you wish to manage your whole fax system. For more information about managing rules priorities and matches in the Incoming Routing Table, please refer to the *XMediusFAX Administration Guide*.

In addition to this, you can configure XMediusFAX to provide notifications in the usual Exchange UM form (2007) when a fax is routed by an Exchange UM Rule: see [Configuring the Mail Notification Profile for UM Integration](#) on page 65.


## Configuring the Mail Notification Profile for UM Integration

 **Note:** This configuration applies only when integrating Microsoft Exchange UM since version 2010.

To receive fax notifications by email in the usual Exchange UM form (2007), all users indicated by the UM module must:


- Exist in a directory known by the Fax Server (see the Directories Integration section of the XMediusFAX *Administration Guide* for more details).
- Have their Profile set to use a Mail Notification Profile configured for Exchange UM integration, as described in the following procedure.

For more details on Profiles and Mail Notification Profiles, see the XMediusFAX *Administration Guide*.


 **Note:** The following configuration is useful only if you have added an Exchange UM Rule to the Incoming Routing Table of your site (see [Configuring the Incoming Routing Table of a Site for UM Routing](#) on page 64).

To configure XMediusFAX to provide notifications in the usual Exchange UM form when a fax is routed by an Exchange UM Rule:

1. In the XMediusFAX administration interface, access the **Configuration ► Mail Notification Profiles** node of your site.
2. Access the properties of the concerned Mail Notification Profile or create a new one, depending on your needs (see the Mail Notification Profiles section of the XMediusFAX *Administration Guide* for more details).
3. In the **Exchange Integration** section of the **Notification Options** tab, select **Generate Exchange UM Message Format for Inbound Faxes Redirected from Exchange UM**.

 **Note:** You can choose to configure this section differently if you wish to customize a bit more the mail notifications management on this profile. To know the behaviors you can expect depending on the possible combinations of the two checkboxes in the **Exchange Integration** section, see [Outlook Forms vs Exchange UM Format: Mail Notification Behaviors](#) on page 66.


4. Validate the configuration with **OK**.

 **Note:** Using this feature (**Generate Exchange UM Message Format for Inbound Faxes Redirected from Exchange UM**) requires the creation of a new Receive Connector with special permissions on your Exchange Server (see the following step).

5. From the prompt of the Exchange Management Shell, create a new Receive Connector by executing the following command:

```
New-ReceiveConnector -Name <ConnectorName> -Bindings "0.0.0.0:25"
-RemoteIPRanges <FaxServerIpAddress> -AuthMechanism ExternalAuthoritative
-PermissionGroups ExchangeServers,Partners
```

- **<ConnectorName>** must be replaced by the name you wish to give to the connector.
- **<FaxServerIpAddress>** must be replaced with the hostname(s) or IP address(es) of the host(s) where the XMediusFAX SMTP Gateway is running.

 **Note:** The permissions enabled for this connector are only the following ones:

- **Authentication ► Externally Secured**
- **Permission Groups ► Exchange Servers**

- **Permission Groups ► Partners**


These permissions are too different from the ones usually set on the default Receive Connector. This is the reason why a new connector dedicated for the XMediusFAX SMTP Gateway is created here.

## ***Outlook Forms vs Exchange UM Format: Mail Notification Behaviors***


While configuring Mail Notification Profile properties for Exchange UM users, you can use different combinations of the two checkboxes in the **Exchange Integration** section (see [Configuring the Mail Notification Profile for UM Integration](#) on page 65) depending on your needs.

As you will see in the following table, the format of mail notifications received by users for each checkbox combination will depend on the type of fax that is processed by the Incoming Routing Table:

- Incoming faxes in UM context, which means faxes that have been routed by the Exchange UM Rule (see [Configuring the Incoming Routing Table of a Site for UM Routing](#) on page 64) – and therefore redirected previously by the Exchange UM module.
- Other incoming faxes, which means faxes that have not been redirected by the Exchange UM module or that have been routed by any other rule than the Exchange UM Rule.

 **Note:** To understand that these cases are possible, remember that a Mail Notification Profile can be shared by several users; some of them may be Exchange UM users as some others may not.

Exchange UM Format	Outlook Forms	Notification Format for Faxes in UM Context	Notification Format for Other Faxes
		No special formatting.	No special formatting.
X		Use of the specific Exchange UM format.	No special formatting.
	X	Use of the XMediusFAX custom forms for Outlook.	Use of the XMediusFAX custom forms for Outlook.
X	X	Use of the specific Exchange UM format.	Use of the XMediusFAX custom forms for Outlook.

 **Note:** Several specific configurations are required before using these two features:

- For **Generate Exchange UM Message Format for Inbound Faxes Redirected from Exchange UM** (represented by “Exchange UM Format” in the table), see [Configuring the Mail Notification Profile for UM Integration](#) on page 65
- For **Enable Use of Customized Outlook Forms** (represented by “Outlook Forms” in the table), see [Microsoft Outlook Forms](#) on page 41.

## Chapter 8


## Client Applications: Installation

### Client Applications Installation

The server installation must precede the installation of the client applications.


The client applications set includes the following components:

- SendFAX / Phone Book
- Web Fax Composer Printer
- Print To Mail
- Outlook Add-in
- Fax Account Monitoring Spot
- Cover Sheet Editor
- Tiff Viewer
- MMC Snap-in
- Java API

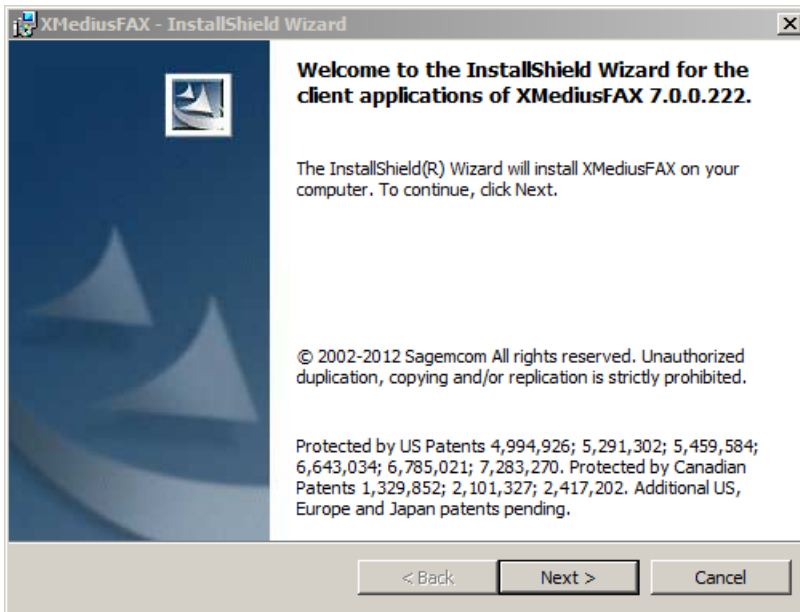
 **Note:** The above set is available via the installation splash screen (or through the installation files located in the `Client` folder of the installation media).

A **reduced** client applications set including only independent applications usable by most of the users (no administration tools) is available through the installation files located in the `ClientRedistribution` folder of the installation media:

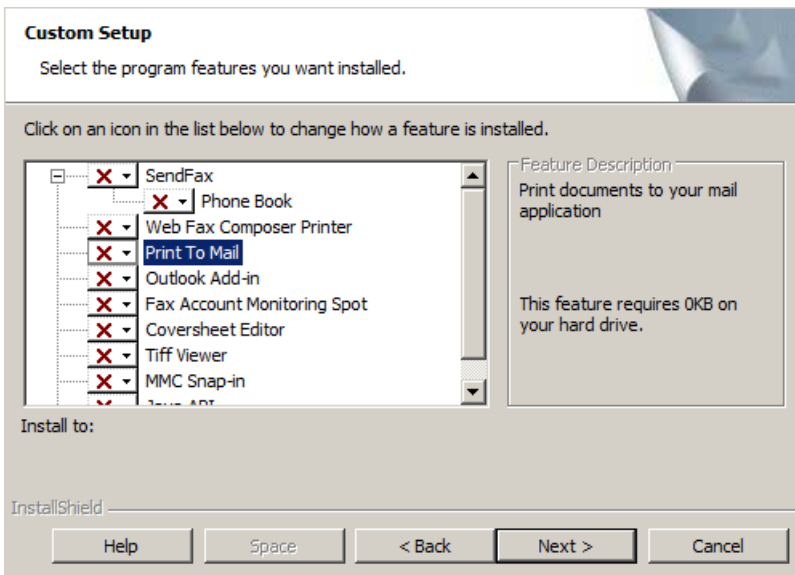
- SendFAX / Phone Book
- Web Fax Composer Printer
- Print To Mail
- Outlook Add-in
- Fax Account Monitoring Spot
- Cover Sheet Editor
- Tiff Viewer


 **Note:** The installation procedure generates a log file which can be found in the `Trace` folder of the server installation folder. The name of the file is `XMInstallLog.log`. Each subsequent installation of XMediusFAX modules appends to this file.


1. In the `Client` directory (or the `ClientRedistribution` directory) of the XMediusFAX distribution media, double-click `Setup.exe`.
2. Select the language and click **OK**.  
After a few seconds, the following dialog appears:




3. Wait until the button is enabled and click **Next**.
4. Read and accept the License Agreement for being able to install the applications, then click **Next**. You can optionally change the installation path before continuing.
5. Click **Next**.
6. Choose the client applications to install (all unselected by default):

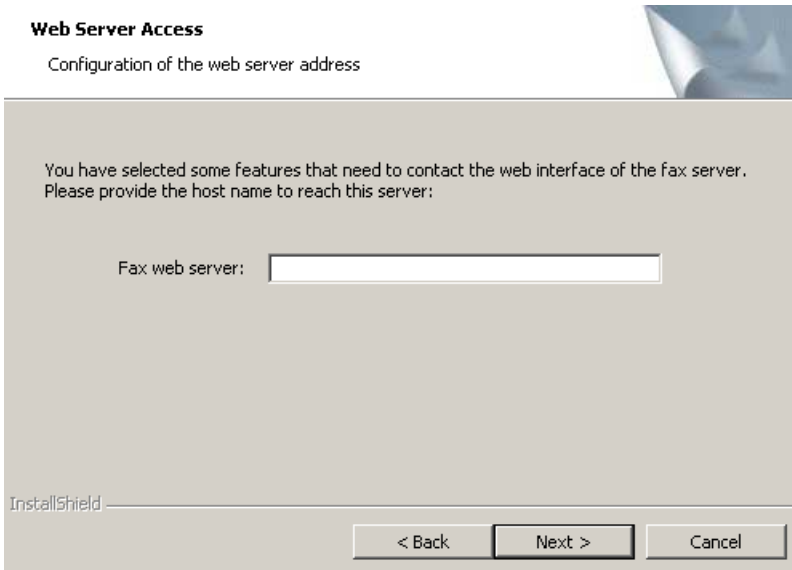


 **Tip:** You can verify disk space by selecting **Space**.

 **Note:** Depending on your license, some features may stay disabled, even if you install them here. Please refer to the XMediusFAX Administration Guide for more details on these features.

 **Attention:** If you are installing the client applications on the host where you installed the server applications (especially the Document Rasterizer), do not select the **Tiff Viewer**, otherwise XMediusFAX will not be able to convert attached TIFF files any more.

7. Click **Next**.  
The **Web Server Access** dialog may appear, depending on the applications being installed.




8. In the **Fax Web Server** field, enter the address at which your Fax Server responds to http requests, according to the following syntax:

```
[{http|https}://]<ServerName_or_IP>[:<Port>]
```

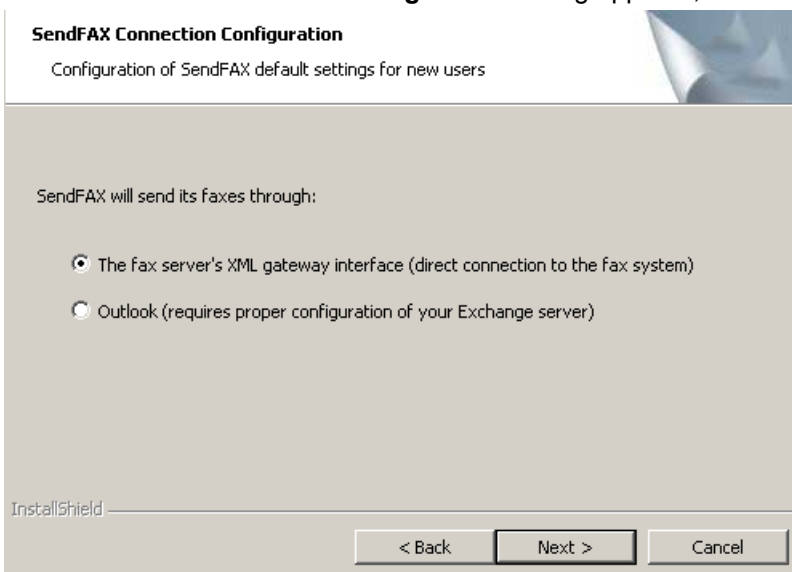
The value can be a host name or an IP address, can include a specific port number and can specify the type of protocol used (normal or secured).

Examples: faxserver, or http://10.60.0.76:8080, or https://faxserver

-  **Note:** If you enter an address with HTTPS, the following string must be the Common Name of your Fax Server, (which is often the Host Name) and not its IP address. For more information on all other required HTTPS configurations (server and client side), see [Secured HTTP \(HTTPS\) Configurations](#) on page 33.

9. Click **Next**.

The **SendFAX Connection Configuration** dialog appears, if SendFAX was selected for the installation.



10. For the **SendFAX Connection Configuration** dialog box, select the mode SendFAX sends faxes through:

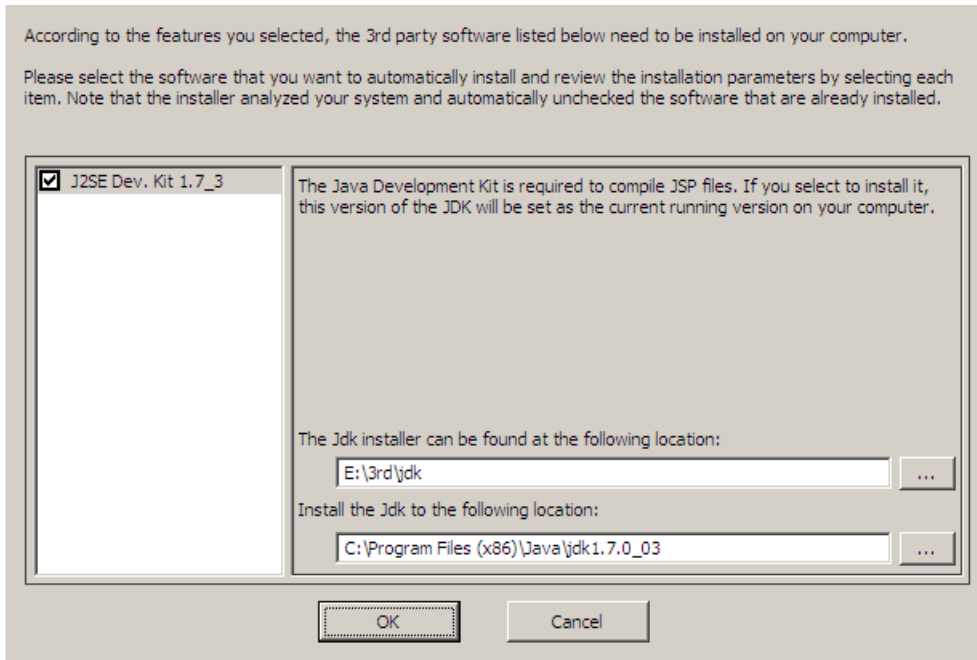
- The default option: **The fax server's XML gateway interface**, or
- The **Outlook** mode, which can be used if your Microsoft Exchange server has been configured for it.


**11. Click Next.**

The Client application install wizard is ready to begin the installation.

**12. Click Install.**

The **Third Party Software Installation** window appears, only if you selected the Java API application in the list. This “prerequisite” software package is required to allow the installed application to function as designed.



 **Note:** The checked application will be installed. If it appears unchecked, it means that it is already installed on the machine (detected by the installer program); there is no need to install it again.

**13. Click OK to begin installation.**

It will take a few minutes for the installation to complete.

**14. When the installation is finished, click Done.**

The Installshield Wizard is completing the XMediusFAX Client Applications installation.

**15. At the end of installation, click Finish.**

Installation has been successfully completed.


## Client Silent Installation

---

How to install client applications through silent mode.

To install the XMediusFAX installer package (which is a Windows installer package) from the command line and in silent mode, you need to do the following :

```
msiexec /i "path to msi" [PARAMETERS] /qn
```

 **Note:** /qn at the end means QUIET with no User Interaction (not even the progress bar).

The parameters are all passed in the form `KEY=VALUE` and separated by spaces, i.e. `KEY1=VALUE1 KEY2=VALUE2...`

 **Note:**

- The `KEY` are case sensitive.



- If the values contain spaces, you have to put the values inside double quotes.

Here are some of the default Parameters used by Windows Installer:

- `INSTALLDIR=[path]` allows you to change the default destination path, i.e. if you want to install in another location than `C:\Program Files\XMediusFAX`
- `ADDLOCAL=[feature1,feature2,...,featureX]` allows you to change the features selected by default to be installed.

To perform an installation through a command line, you must know the internal name of every feature. These names are the ones you see in the **Custom Setup** window when you perform an installation with InstallShield.

Also, installing client applications through the command line allows you to customize more parameters (on some of the features) than by using InstallShield.

The following sections give you the exact syntax of the features names and of their associated parameters (when existing).

#### **Note:**

- All the features names must be written in lower case.
- If the default value of a parameter corresponds to your needs, it is not necessary to specify it on the command line.

### **SendFax**

Feature name: `sendfax`


SendFax parameters help to define the defaults for the registry keys. When SendFax is started for the first time, it validates the settings for the current user (`HKEY_CURRENT_USER`). If Not, it uses the default settings from (`HKEY_LOCAL_MACHINE`) that the installation program did set and it prompts the user, when needed, with the configuration dialogs to configure the user id, password and email notifications.

Here are the parameters for SendFAX:

- `CFG_SENDFAX_LOGIN_TYPE=`. Possible Values are:
  - 1 = send faxes through outlook/exchange
  - 2 = send faxes through XML Gateway, using anonymous account (not recommended)
  - 3 = send faxes through XML Gateway, using NT account (default)
  - 4 = send faxes through XML Gateway, using a specific user/password (SendFax will prompt for this user/password)
- `CFG_SENDFAX_RETRIEVE_AD_USER_INFO=` (applies only to Exchange connection, not available in installation UI). Possible Values are:
  - 0 = don't retrieve default sender information from Active Directory
  - 1 = retrieve default sender information from Active Directory (default)
- `CFG_SENDFAX_FORCE_WIZARD_ON_FIRST_LOGIN=` (not available in the installation UI). Possible Values are:
  - 0 = SendFax will not display its configuration wizard if it has all the information it needs
  - 1 = SendFax will display its configuration wizard even if it has all the information it needs (default)
- `CFG_WEBSERVER_HOST=`. Enter the address at which your Fax Server responds to http requests, according to the following syntax:

```
[{http|https}://]<ServerName_or_IP>[:<Port>]
```

Examples: `faxserver`, or `http://10.60.0.76:8080`, or `https://faxserver`

 **Note:** If you enter an address with HTTPS, the following string must be the Common Name of your Fax Server, (which is often the Host Name) and not its IP address. For more information on all other required HTTPS configurations (server and client side), see [Secured HTTP \(HTTPS\) Configurations](#) on page 33.

- `CFG_SENDFAX_SIMPLE_MODE=` (not available in the installation UI). Defines the SendFAX interface to be used by default when the application is launched via the XMediusFAX virtual printer. Possible Values are:
  - 0 = full interface (default)
  - 1 = basic interface
- `CFG_SENDFAX_RELAY_SERVER_ADDRESS=` (not available in the installation UI). Defines the mail relay server address to be used for the email feature of SendFAX.

**Example:** `CFG_SENDFAX_RELAY_SERVER_ADDRESS=smtp.example.com`

- `CFG_SENDFAX_EMAIL_FILE_FORMAT=` (not available in the installation UI). Defines the default file format for the email attachment. Possible Values are:
  - 0 = PDF (default)
  - 1 = TIFF

### Phone Book

Feature name: `phonebook`

No customizable parameter.


### Web Fax Composer Printer

Feature name: `printtowebs`

Customizable parameter: `CFG_WEBSERVER_HOST=`. Enter the address at which your Fax Server responds to http requests, according to the following syntax: :

```
[{http|https}://]<ServerName_or_IP>[:<Port>]
```

Examples: `faxserver`, or `http://10.60.0.76:8080`, or `https://faxserver`

 **Note:** If you enter an address with HTTPS, the following string must be the Common Name of your Fax Server, (which is often the Host Name) and not its IP address. For more information on all other required HTTPS configurations (server and client side), see [Secured HTTP \(HTTPS\) Configurations](#) on page 33.

### Print To Mail

Feature name: `printtomail`

No customizable parameter.

### Outlook Add-in

Feature name: `outlookaddin`

Customizable parameter: `CFG_CREATE_WEBSTATUS_FOLDER=` (not available in installation UI). Possible Values are:

- 0 = Do not create the WebStatus Folder in outlook
- 1 = Create the WebStatus Folder in outlook (default)

### Fax Account Monitoring Spot

Feature name: `spot,spot_all_lang` (full required string)

No customizable parameter.

### Cover Sheet Editor

Feature name: coversheeteditor

No customizable parameter.

### Tiff Viewer

Feature name: tiffviewer

No customizable parameter.

### MMC Snap-in

Feature name: mmcnapin

No customizable parameter.

### Java API

Feature name: javaapi

This is an administration utility. It is recommended install it manually (see [Client Applications Installation](#) on page 67).

### Some Examples

How to install Print To Mail in c:\program files\test:

```
msiexec /i
"d:\Client\XMediusFAX.msi"
ADDLOCAL=prnttomail
INSTALLDIR="c:\program files\test"
/qn
```

How to install Print To Mail, SendFax and the Phone Book in the default folder, using specific configuration parameters for SendFax:

```
msiexec /i
"d:\Client\XMediusFAX.msi"
ADDLOCAL=prnttomail,sendfax,phonebook
CFG_WEBSERVER_HOST=faxserver.example.com
/qn
```

How to install Print To Mail, SendFax and the Phone Book in the default folder, but changing the SendFax defaults to use an XMediusFAX user:

```
msiexec /i
"d:\Client\XMediusFAX.msi"
ADDLOCAL=prnttomail,sendfax,phonebook
CFG_WEBSERVER_HOST=faxserver.example.com
CFG_SENDFAX_LOGIN_TYPE=4
/qn
```



How to install SendFax and the Phone Book in G:\program files\FaxServer; it will be using the default NT authentication with Sendfax:

```
msiexec /i
"d:\Client\XMediusFAX.msi"
INSTALLDIR="G:\program files\FaxServer"
ADDLOCAL=sendfax,phonebook
CFG_WEBSERVER_HOST=tchxdm02
CFG_SENDFAX_FORCE_WIZARD_ON_FIRST_LOGIN=0
/qn
```

## ***Installing the Fax Merge Macros (MS Word and OpenOffice.org)***

---

All the tools needed for installing the fax merge macros are available on the user's computer since the SendFax client is installed (see [Client Applications Installation](#) on page 67). By default, these tools can be found at the following path: `C:\Program Files\XMediusFAX\Client\MailMerge`.

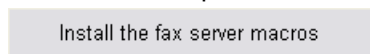
-  **Note:** The installation depends on the text application used (MS Word or OpenOffice.org), and on its version. Therefore, several installation procedures are described here.
-  **Important:** To ensure that the fax merge macros function properly, when you install MS Office, make sure the Visual Basic for Applications (VBA) component is installed along with it.

### ***Installation Procedure for Microsoft Word 2003 or Earlier Versions***

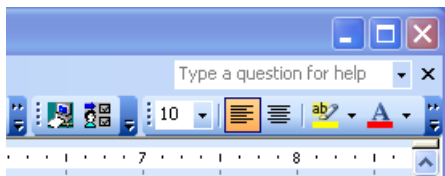
---

1. Open Microsoft Word.
2. In the menu bar, select **Tools** ► **Options**, then select the **Security** tab.
3. Click **Macro Security**.
4. If the selected option is **Very High** or **High**, select the **Medium** option and click **OK**.
5. Click **OK**.
6. Open the document `xmmerge.doc` located in the `<install_path>\Client\MailMerge\en` folder.
7. Click **Enable Macros**.

The document opens with a single button:



8. Click on the button to launch the installation.  
After the installation, the new toolbar appears at the top right of the Microsoft Word window.

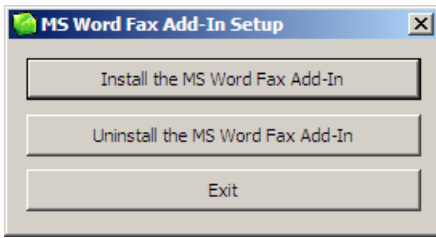


If the macro security was changed to allow this installation, it should be set again to its original level, as shown at the first steps of the procedure.

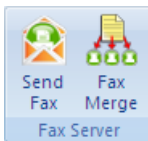
### ***Installation Procedure for Microsoft Word 2007 / 2010***

---

1. Go to the `<install_path>\Client\MailMerge` folder.
2. Run the `WordRibbonSetup.exe` file.  
The following dialog appears:



3. Click **Install the MS Word Fax Add-In**.
4. After the installation, start Microsoft Word.  
A new tab **Fax** should appear in the ribbon, and under this tab, two functions: **Send Fax** and **Fax Merge**.



For using these functions, please refer to the XMediusFAX *User Guide*.

## ***Installation Procedure for OpenOffice.org***

---

1. Open OpenOffice.org Writer.
2. In the menu bar, select **Tools** ► **Options**, then select the **OpenOffice.org** ► **Security** node.
3. Click **Macro Security**.
4. If the selected option is **Very High** or **High**, select the **Medium** option and click **OK**.
5. Click **OK**.
6. Open the `faxmacros.sxw` document located in the `<install_path>/Client/MailMerge` folder.
7. Click **Enable Macros**.

The document opens with two buttons:



8. Click on the **Install fax macros** button to launch the installation.  
After confirmation, the macros are installed.  
  

**Note:** A message box indicates that you must close and restart OpenOffice.org and the quick launch bar (icon at the bottom-right of the screen) in order for the installation to be effective.
9. Restart OpenOffice.org Writer.  
The **Fax** menu, containing the **FaxBroadcast** and **SendFax** submenus appears now between the **Tools** and **Window** menus.

If the macro security was changed to allow this installation, it should be set again to its original level, as shown at the first steps of the procedure.


## ***Installing the Microsoft Office Internet Fax Service for XMediusFAX***


---

Since their 2003 version, MS Office programs include a built-in Internet Fax Service functionality allowing users to connect directly to a fax service provider that will send the fax for them.

XMediusFAX users can send faxes through XMediusFAX by selecting this feature, as long as all of the following points are true on the users computers:

- Microsoft Office (at least version 2003) is installed.
- The Office installation includes necessarily Microsoft Outlook, which has been configured to send emails.
- The following Microsoft feature is installed, depending on the version of MS Office:
  - For MS Office 2003 or 2007: Microsoft Office Document Imaging (MODI, installed by default and available from the MS Office installation program, under “Office Tools”).
  - For MS Office 2010: the Microsoft Windows fax printer driver (installed by default on Windows Vista and Windows 7, also available on Windows 2008 through the Fax Server role).

 **Note:** If you have any issues finding or installing MODI or the Windows fax printer driver, please refer to the Microsoft support.

 **Note:** It could happen that the feature does not work because of 64-bit incompatibility, for example if MS Office 2007 would be installed on Windows 2008 64-bit.

- Some specific configuration (described here) has been performed by an administrator.

All the tools needed to configure Microsoft Office for using the Internet Fax Service with XMediusFAX are available on the XMediusFAX distribution media at the path: `Tools\OfficeFax`.

The configuration can be done:

- On single computers (one by one): [Installation on a Single Computer](#) on page 76, or
- By massive deployment (all computers at the same time): [Installation by Massive Deployment through Group Policy](#) on page 77

## ***Installation on a Single Computer***


---

To install the Internet Office Fax Service configuration for XMediusFAX:

1. From the computer to configure, access the `Tools\OfficeFax` folder of the XMediusFAX distribution media.
2. Make a local copy of the `OfficeFaxInstall.reg` file.
3. Edit this file using a text editor:

- a) Identify the block of registry keys corresponding to the version of Microsoft Office running on this computer (2003, 2007 or 2010).
- b) In the identified block, replace the `[SMTP Domain]` placeholder with the appropriate string (domain name, FQDN, etc...) that your mail server will resolve to the IP address of your fax server.

For example: `fax.example.com`

 **Note:** Take care to not remove any other string or character than the `[SMTP Domain]` placeholder.

- c) Save and close the file.



4. Execute the modified `OfficeFaxInstall.reg` file.

This computer is now configured to use the Microsoft Office Internet Fax Service feature with XMediusFAX through the specified SMTP domain.

## ***Installation by Massive Deployment through Group Policy***

---

To be able to massively deploy the Internet Office Fax Service configuration for XMediusFAX, you need to perform the following steps including a configuration of your Active Directory:

1. From any computer, logon with an account having administrative permissions on your Active Directory.
2. Access the `Tools\OfficeFax` folder of the XMediusFAX distribution media.
3. Make a local copy of the `OfficeFaxInstall.reg` file.
4. Edit this file using a text editor:
  - a) In all 3 blocks of registry keys (each block corresponding to a different version of Office: 2003, 2007 or 2010), replace the `[SMTP Domain]` placeholder with the appropriate string (domain name, FQDN, etc...) that your mail server will resolve to the IP address of your fax server.  
For example: `fax.example.com`
  -  **Note:** Take care to not remove any other string or character than the `[SMTP Domain]` placeholder.
  - b) Save and close the file.
5. Configure your Active Directory as follows:
  - a) Open the **Active Directory Users and Computers**.
  - b) Select the target domain for the deployment (the domain corresponding to the targeted users).
  - c) Under this domain, select an existing **Organizational Unit** containing targeted users and display its **Properties**.  
 **Note:** All the members of this unit will be subject to the deployment.
  - d) Under the **Group Policy** tab, create a new **Group Policy Object** and edit it.
  - e) Select **User Configuration > Windows Settings > Scripts Logon/Logoff**.
  - f) Display the **Properties** of the **Logon** item.
  - g) Add the following files to the **Logon** folder (using the **Show Files** button):
    - `OfficeFaxInstall.reg` (the local one you modified with the correct SMTP domain)
    - `OfficeFaxRegistryInstall.cmd` (directly from the XMediusFAX distribution media)
  - h) **Add** a new script and **Browse** for selecting the `OfficeFaxRegistryInstall.cmd` file you just added to the **Logon** folder.
  - i) Validate and go back to the **Active Directory Users and Computers** main interface.
  - j) Repeat all these steps for any Organizational Unit that is concerned by the deployment described here.

From now, every user registered within the Organizational Units you just edited above will get their Internet Office Fax Service feature silently configured on next logon. All these users will be able to use the feature with XMediusFAX through the specified SMTP domain.





## Chapter 9

## Maintenance

### Modifying a Server Installation

---


How to add or remove server applications.


On the concerned server:

1. From the root directory of the XMediusFAX installation media, double-click `Setup.exe`.
2. Click **Server** on the splash screen.
3. In the **Program Maintenance** dialog, select **Modify**.

 **Note:** We do not recommended you use the **Repair** option. If you have problems with your installation, contact XMediusFAX technical support.

4. In the **Custom Setup** screen, select or unselect applications according to your needs.

 **Note:** A red **X** indicates that the application is not currently installed.

 **Note:** Depending on your license, some features may stay disabled, even if you install them here. Please refer to the XMediusFAX Administration Guide for more details on these features.

5. Follow setup wizard instructions to complete the installation.

### Modifying a Client Installation

---


How to add or remove client applications.


On the client computer:

1. In the `Client` directory of the XMediusFAX installation media, double-click `Setup.exe`.
2. Select the language and click **OK**.
3. In the **Program Maintenance** dialog, select **Modify**.

 **Note:** We do not recommended you use the **Repair** option. If you have problems with your installation, contact XMediusFAX technical support.

4. In the **Custom Setup** screen, select or unselect applications according to your needs.

 **Note:** A red **X** indicates that the application is not currently installed.

 **Note:** Depending on your license, some features may stay disabled, even if you install them here. Please refer to the XMediusFAX Administration Guide for more details on these features.

5. Follow setup wizard instructions to complete the installation.


## Managing the Services

---

This section shows how to easily and quickly stop or start the services of the fax server.

As an alternative to the use of Windows Services interface, a tool is provided with XMediusFAX, allowing you to manage easily the services of the fax server. To access this tool (a command-line executable file):

1. Through the command line, access the `C:\Program Files\XMediusFAX\Bin\Util` folder.
2. Choose the action to perform:
  - Type `xmsc -ra` If you need to restart (i.e. stop and restart immediately) all the services, or
  - Type `xmsc -oa` If you need to stop all the services, or
  - Type `xmsc -aa` If you need to start all the services.
3. Validate the command.

 **Note:** The services may take a few minutes to change status.

## Backing Up XMediusFAX

---

For security reasons, you can decide to backup all existing files and data concerning XMediusFAX. It is recommended that you do it on all the machines part of the XMediusFAX system.

1. Stop all XMediusFAX services and MySQL services before starting the backup.  
For more information on how to manage services, see [Managing the Services](#) on page 80.
2. Make a copy of all the following XMediusFAX folders, found in the folder where the fax server was installed:
  - the `Data` folder<sup>1</sup>
  - the `Bin` folder
  - the `Config` folder
3. Make a copy of the MySQL `Data` folder, found in the folder where MySQL was installed.
4. Export the `HKEY_LOCAL_MACHINE\SOFTWARE\Interstar Technologies` key from Regedit to a `.reg` file.
5. Once the backup is complete, restart all XMediusFAX services and MySQL services.

## Backing Up Users Phone Books

---

To preserve their phone books, individual users in Microsoft Windows 2003 and XP can backup the following folder: `Documents and Settings\<username>\Application Data\Fax\PhoneBook`.

 **Note:** For the Microsoft Windows Vista and Windows 7 users, the path is the following one:  
`Users\<username>\AppData\Roaming\Fax\PhoneBook`.

---

<sup>1</sup> The `MediaStore` subfolder of the `Data` folder contains a lot of files and may take a really long time to backup. The files within this folder are not touched during the upgrade procedure, so, unless you want to take the full backup of your system for archiving purpose, you may want to skip this subfolder.


## Upgrading Server Applications

---

### Before Upgrading

---

XMediusFAX can be upgraded from an earlier version by simply running the installer of the newer version. However, we highly recommended that you read and follow the step-by-step upgrade procedure described in this section. Before proceeding with the upgrade, please take note of the following:

- The upgrade will have to be performed on all servers that are part of the XMediusFAX system. This includes all the servers that run the core (replicated) software, all the “worker-only” servers (computers running only Drivers, Rasterizers and Gateways) and all the computers running the MMC Administration snap-in. Other client tools, such as SendFAX, can be upgraded at a later time as they are compatible with the new Server version.
  - The target system for the upgrade must be fully functional. Do not upgrade a system with components having problems to start and become active.
  - The upgrade modifies the files that hold the state of the system. This includes multiple files located under `<xmediusFAX>\Data` and the MySQL databases.
  - The upgrade process will backup any state-related file it modifies, with the exception of the databases (CompanyConfig and XmediusArchive).
  - Installing the new version will overwrite some configuration files present in `<xmediusFAX>\Config` (this is not related to the System or Site Configurations made through the administrator snap-in). If you applied custom modifications to these files, you may want to review them after the installation.
  - The upgrade installs, if needed, new third party software, disabling the old versions but leaving them installed on the computer.
  - The web-related package (`xmedius.war`) will be replaced during the upgrade. If you made custom modifications to the web interface, you will have to re-apply them after the upgrade.
  - You should review the release notes of the software as they list a few changes from earlier versions that are of interest for administrators.
  - If you have built custom tools (external notification software, JavaApi scripts, reports that query the archive database etc.), it is highly recommended that you check to make sure those tools will integrate properly with the new version of XMediusFAX. Install the software on a test system before upgrading your production system.
  - Also, verify if the version you are going to install for the upgrade needs a new license. If this is the case, make sure to have the new license file available before proceeding: you will need it during the upgrade.
-  **Note:** If you are using a Brooktrout fax board, you must upgrade the Boston pnp Driver to version 6.0 minimum (available in the `3rd\dialogic_brooktrout` folder from the XMediusFAX distribution media) before upgrading XMediusFAX. This requires first to stop the Driver service.

### Upgrading Server Applications


---

To upgrade your server in safe conditions, see first [Before Upgrading](#) on page 81.

The following steps are made to facilitate the upgrade process and to ensure that your production server(s) are back online as fast as possible. The upgrade process should follow these guidelines:

1. Stop all outbound and inbound faxing traffic and wait until the outgoing queue is clear. You can also use Perfmon to monitor the FaxManager's internal queues and make sure everything has been delivered.

2. On all computers running only “worker” components of the XMediusFAX system (only Drivers, Rasterizers or Gateways), run `<xmediusFAX>\bin\util\xmsc.exe -oa` to stop the services (you can also opt to stop the services via Windows Services).
3. If you have a replicated system (two FaxManagers within the same system), stop all the XMediusFAX services on one of them and wait until their status shows “Fault” in the Services Status (XMediusFAX Administration Snap-In). To stop the services you can run `<xmediusFAX>\bin\util\xmsc.exe -oa`. It is important to let the services terminate properly. Make sure that all the components become Active/Primary on the other server.
4. On the remaining server, stop all the services. Again, you can use `<xmediusFAX>\bin\util\xmsc.exe -oa`. It is important to let the services terminate properly.
5. Close any running instance of the XMediusFAX Administration snap-in.
6. At this point, it is highly recommended to perform a backup of all the data (see below).
7. For the upgrade, beginning with the last server on which you stopped the services, perform the upgrade by running the new XMediusFAX installation. On an upgrade, you will only be prompted with the dialog that asks for the license. If you choose not to upgrade the license at this point, you may need to update it later through the XMediusFAX Administration snap-in (in case of a major version upgrade). You will also be prompted with the Third Party Installer application to upgrade the necessary 3rd party software (see the description of the Third Party Software Installer in the previous chapter).
8. Once the update is completed successfully on that server, proceed with the replicated server, if present and then the “worker-only” servers (if any are present).

 **Note:** During the XMediusFAX upgrade process, the 3rd-party software upgrades that are required are automatically performed by default (unless you unselect them). However, there can be exceptions: see [MySQL](#) on page 25.

## Chapter 10

## Uninstallation

### Complete Removal of Server Applications

---

To completely remove the XMediusFAX server applications from a computer:

1. In Windows, click **Start ► Settings ► Control Panel**.
2. In the **Control Panel**, double-click **Add/Remove Programs**.
3. Click on the **XMediusFAX Version\_Number (Server Applications)** item.
4. Click **Remove**.
5. In the appearing Confirm dialog, click **Yes**.  
It will take a few minutes for the uninstallation to complete. You can observe the progress, however, with the status bar that is displayed.
6. Browse to, and delete the `\Program Files\XMediusFAX` directory.
7. Execute the following command (to delete the `\MySQL\XMediusArchive` directory):

```
call <mysql>\bin\mysqladmin.exe" -f drop xmediusarchive
```

(`<mysql>` must be replaced by the MySQL installation path.)

### Complete Removal of Client Applications

---

To completely remove the system client applications from a computer:

1. In Windows, click **Start ► Settings ► Control Panel**.
2. In the **Control Panel**, double-click **Add/Remove Programs**.
3. Click on the **XMediusFAX <Version\_Number> (Client Applications)** item.
4. Click **Remove**.
5. In the appearing **Confirm** dialog, click **Yes**.  
It may take a few minutes for the uninstall to complete.

### Removing Published Forms

---

If you wish to uninstall XMediusFAX Forms that have been published, you may have to refer to the on-line help of your mail client, as the way to do it can be different depending on the version of the software.

## Removing Published Forms in Outlook

---

To delete a form that you have published but no longer need, you need to access the **Manage Forms** window. You can access this window two ways, either through the **Tools** menu, or through the **Properties** window of a folder.

To remove a published form:

1. Access the **Manage Forms** window:
  - Using the folder properties:
    - a) Right-click a folder (typically the folder in which the form was published) and click **Properties**.
    - b) Select the **Forms** tab and click **Manage**.
  - Without selecting a folder:
    - a) Select **Tools ► Options**.
    - b) Select the **Other** tab and click **Advanced Options**.
    - c) Click **Custom Forms**.
    - d) Click **Manage Forms**.
2. If you need to select the forms library or folder that contains the published form:
  - a) Click **Set** to open the **Set Library To** window.
  - b) Select the concerned forms library or folder and click **OK**.
3. Select the form you want to remove and click **Delete**.

## Removing Published Forms in Lotus Notes

---

To remove the forms that you have published, you only need to reverse some actions done during the installations of these forms:

1. Refer to the section: [Installing and configuring the Fax Memo Template](#) on page 45 and redo the appropriate property modification actions (in organization's inbox properties and Mail-Fax template properties) to revert to the original configuration.
2. Refer to the section: [Synchronizing the Mail Template Databases](#) on page 48 in order to apply the changes.
3. If needed, delete the `MailFaxTemplate.ntf` file that was copied in the `\Lotus\Domino\Data\Fax` directory.

## Uninstalling the Microsoft Office Internet Fax Service Configuration for XMediusFAX

---

All the tools needed to uninstall the Microsoft Office configuration for using the Internet Fax Service with XMediusFAX are available on the XMediusFAX distribution media at the path: `Tools\OfficeFax`.

The uninstallation can be done:

- From single computers (one by one): [Uninstallation from a Single Computer](#) on page 85, or
- By massive deployment (from all computers at the same time): [Uninstallation by Massive Deployment through Group Policy](#) on page 85

## ***Uninstallation from a Single Computer***

---

To uninstall the Internet Office Fax Service configuration for XMediusFAX:

1. From the computer concerned by the uninstallation, access the `Tools\OfficeFax` folder of the XMediusFAX distribution media.
2. Execute the `OfficeFaxRemove.reg` file.


The Microsoft Office Internet Fax Service feature configuration for XMediusFAX is now removed.

## ***Uninstallation by Massive Deployment through Group Policy***

---

To be able to massively uninstall the Internet Office Fax Service configuration for XMediusFAX, you need to perform the following steps including a configuration of your Active directory:

1. From any computer, logon with an account having administrative permissions on your Active Directory
2. Access the `Tools\OfficeFax` folder of the XMediusFAX distribution media.
3. Configure your Active Directory as follows:
  - a) Open the **Active Directory Users and Computers**.
  - b) Select the target domain for the deployment (the domain corresponding to the targeted users).
  - c) Under this domain, select an existing **Organizational Unit** containing targeted users and display its **Properties**.
 

 **Note:** All the members of this unit will be subject to the deployment.
  - d) Under the **Group Policy** tab, edit the **Group Policy Object** that was created for the installation of the feature.
  - e) Select **User Configuration > Windows Settings > Scripts Logon/Logoff**.
  - f) Display the **Properties** of the **Logon** item.
  - g) If it still exists (from the feature installation), **Remove** the script named `OfficeFaxRegistryInstall.cmd`, as it is now useless.
  - h) Add the following files directly from the XMediusFAX distribution media to the **Logon** folder (using the **Show Files** button):
    - `OfficeFaxRemove.reg`
    - `OfficeFaxRegistryRemove.cmd`
  - i) **Add** a new script and **Browse** for selecting the `OfficeFaxRegistryRemove.cmd` file you just added to the **Logon** folder.
  - j) Validate and go back to the **Active Directory Users and Computers** main interface.
  - k) Repeat all these steps for any Organizational Unit that is concerned by the uninstallation described here.

From now, every user registered within the Organizational Units you just edited above will get their Internet Office Fax Service feature configuration silently removed on next logon.





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